USER MANUAL

Get started

Activimmo

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Introduction

This manual provides detailed information about the real estate software **Activimmo** and allows you to use it right away. Besides the software's description, this manual will guide you through the various screens of **Activimmo**. You will also find information about the features, various windows, advanced options, such as configuring the interface, customizing the software, etc.

Whether you are a beginner or an experienced IT user, you will find all the information you need to be able to use **Activimmo**.

Presentation

Overview

Welcome to **Activimmo**. With this software, your work is faster and easier. It offers you significant productivity gains. Managing properties and contacts is greatly facilitated by an intuitive graphical interface. In addition, it includes tools that allow you to automatically publish to your own website. It also incorporates the ability to send your listings and documents to your clients by email.

Simple and visual

Navigation within **Activimmo** is simple and effective. It relies on a Windows-like interface to allow you to easily get started.

The ergonomy of the **Activimmo** interface, developed in conjunction with professionals, was designed to simplify the work, record properties and contacts, create all your documents, etc ... can be done in just a few clicks.

A customizable tool

Activimmo allows you to insert all your agency data as well as documents you use.

Thus, the documents to be produced automatically (commercial relaunches, sales agreement) will be **YOUR** documents and not standard documents.

In addition, the specific data that you manage will be supported directly by the application; options and headings can also be added or removed from the data entry screens, Web pages, etc... In fact, the customization possibilities of **Activimmo** are endless.

A software open to the world

Activimmo is also a great tool to open to the Web, allowing instant creation of a website without having to worry about programming. Simply choose the type of website you wish to

have and launch the synchronization process. A few seconds later your products are available on your global showcase, offering an unlimited number of photos and presenting your properties, without shedding a single drop of ink.

Your clients will be able to take a virtual tour within your showcased products without you having to do any work. **Activimmo** allows you to reach new clients through **Internet**.

Finally, **Activimmo** is open to the world thanks to its customizable geographical and linguistic features, allowing it to adapt to all parts of the world. Thus, you can generate your emails in multiple languages.

Where to find help?

Online Assistance

Activimmo incorporates **tooltips (information bubbles)** who will accompany you every time. They appear when you position the cursor over a field to be filled in, on features, etc ... These information bubbles will be helpful when you visualize data about properties, contacts, etc.

Activimmo also allows you to access online assistance in a single click on the icon of the buoy or by selecting the Menu **Help/Online assistance** or via the keyboard shortcut **F1.**

The User Manual

Activimmo comes with this User Manual to help you get started right away. The User Manual includes tutorials that will quickly train you to use the various functionalities of the software. In case the User Manual does not meet your expectations or if you need help right away, you can use the built-in **Activimmo online assistance**.

To open the manual: **Help** Menu - **User Manual**

Find out more

If you want to find out more about using the software or about the various possibilities of **Activimmo**, simply log on to the website dedicated to this software:
http://www.activimmo.com/

Installation

Installation procedure

To install the **Activimmo** software, simply download it from our website, under the tab 'Download':
http://www.activimmo.com/

You can then use **Activimmo** using the icon that appears on your desktop or access it via the **Start menu**.

First Launch

When you first launch the software, **Activimmo** will ask you to enter some basic information required for its use (defining sectors, agency contact information...). You will also be prompted to enter an activation code. This code will be issued when you provide us your unique **Activimmo** number which will be displayed on the screen.

Once the application is activated, you must enter an administrator's name and password. The Administrator will be responsible for managing the advanced software features as well as the application set up.

❖ **Note**: The administrator is considered as responsible for the operation of **Activimmo**. In a small structure, it will be the best IT user or the person who has been trained by **Activimmo** trainers. The administrator will in charge of the **Users** and **Settings** windows.

The Activimmo administrator must read and fully understand the concept of advanced usage listed in this manual.

Adjusting Settings

To adjust the settings, you need to follow the procedure that starts when you first launch **Activimmo**. You will then be prompted to enter your agency contact information, insert sectors and add the property types. You can also adjust and set the default values that will be displayed every time you insert a property in the software.

The parameters entered are not definitive. To modify them, you must click on the **Customize data** menu, then **General Settings** to update the agency data or on **Properties** to modify data relating to properties.

In addition, if you want to publish your company's data and your ads on Internet, you must complete the information in the **Directories** tab (Under **General Settings**). To fulfill these settings, you must send us an email with your agency publication request on Internet along the name you chose for your Website. In return, we will provide you the information to add in the **Directories** tab.

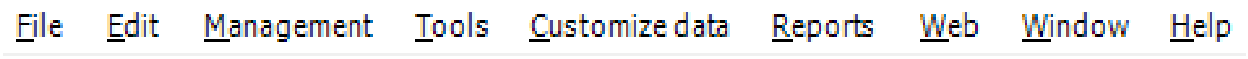
For further information on this topic, read the section about **Activimmo** Web functionalities.

Using Activimmo

Description of the Interface

After launching **Activimmo**, the first thing you see (blue background with integrated logo) is the **Activimmo** workspace. From here you have access to all **Activimmo** tools.

At the top is the menu bar: **File, Edit, Management, Tools, Customize data, Reports, Web, Window** and **Help** menu which provides you assistance as well as various information.



The Tool bar

Under the menu bar there is another zone, the **Toolbar** (the bar where the icons are located) which allows you to quickly access some features or windows.

- The first icon allows you to **close Activimmo**

- The next four icons allow you to insert **new data**, make **modifications**, **save** and **delete** selected data.

➢ The next icon allows you to **refresh** all data loaded in memory.

➢

➢ The next four icons allow you to **open** the **property** and **contacts** management **windows**, manage **offers and sales** and **open the agenda.**

➢ The next icon allows you to search by phone number.

➢ The next set of two icons allows you to **create a document** and access the **loan calculator**.

➢ The next two icons allow you to **write** and **read intranet messages**.

➢ The **print** icon allows you to create property listings as well as create documents that you will be able to print directly.

➢ The icon representing a hand allows you to **hide/show sensitive data**.

➢ This icon allows you to **update your website** (Manage Web publications).

➢ This icon allows you to quickly access the **online assistance**.

➢ The last icon allows you to **close** the **current window**.

The Menu

From the Menu, you have access to all **Activimmo** functionalities.

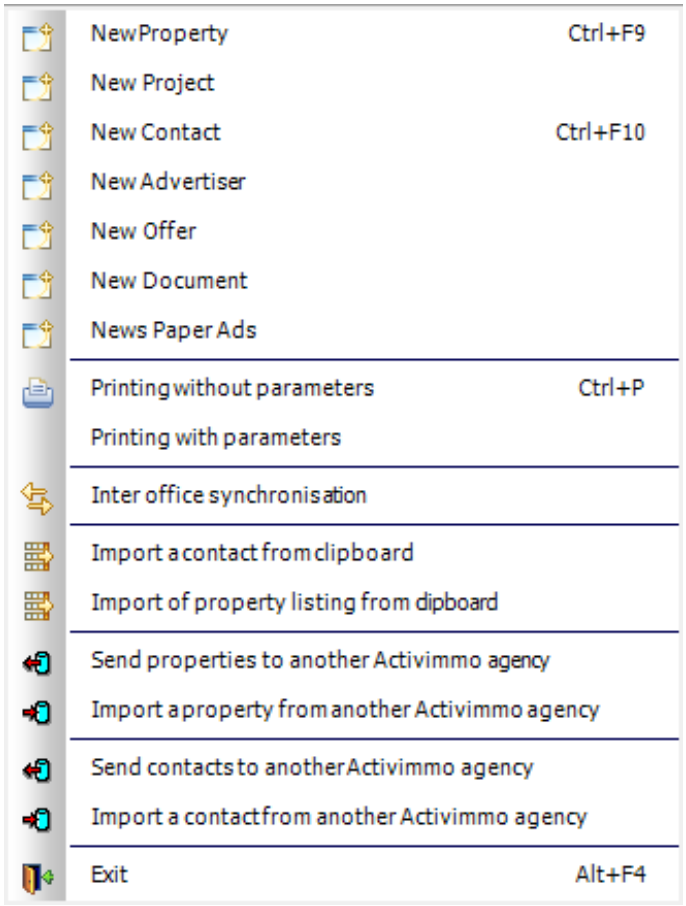
File Edit Management Tools Customize data Reports Web Window Help

We will briefly explain these menus.

Menu description:

File Menu

Here is the content of the **File Menu**:



1- **New Property**: allows you to create a new property in the database.

2- **New Project**: allows you to create new projects in the database.

3- **New Contact**: allows you to create a new contact (buyer, owner, notary...)

4-**New Advertiser**: allows you to create a new advertiser.

5-**New Offer**: allows you to create a new sale offer or rental offer for a property.

6-**New document**: allows you to create a new document template.

7-**Newspaper Ads**: allows you to create newspaper ads (newspapers/ magazines,…)

8-**Printing without parameters**: allows you to print documents without having to modify the print settings

9-**Printing with parameters**: allows you to print documents using the desired print settings (Orientation / Colour / Paper / etc...)$

10-**Inter office synchronisation**: allows you to synchronize multiple agencies databases. You will need to set the parameters beforehand in Activimmo (ID/ password,etc.)
For help, contact your Activimmo technician.

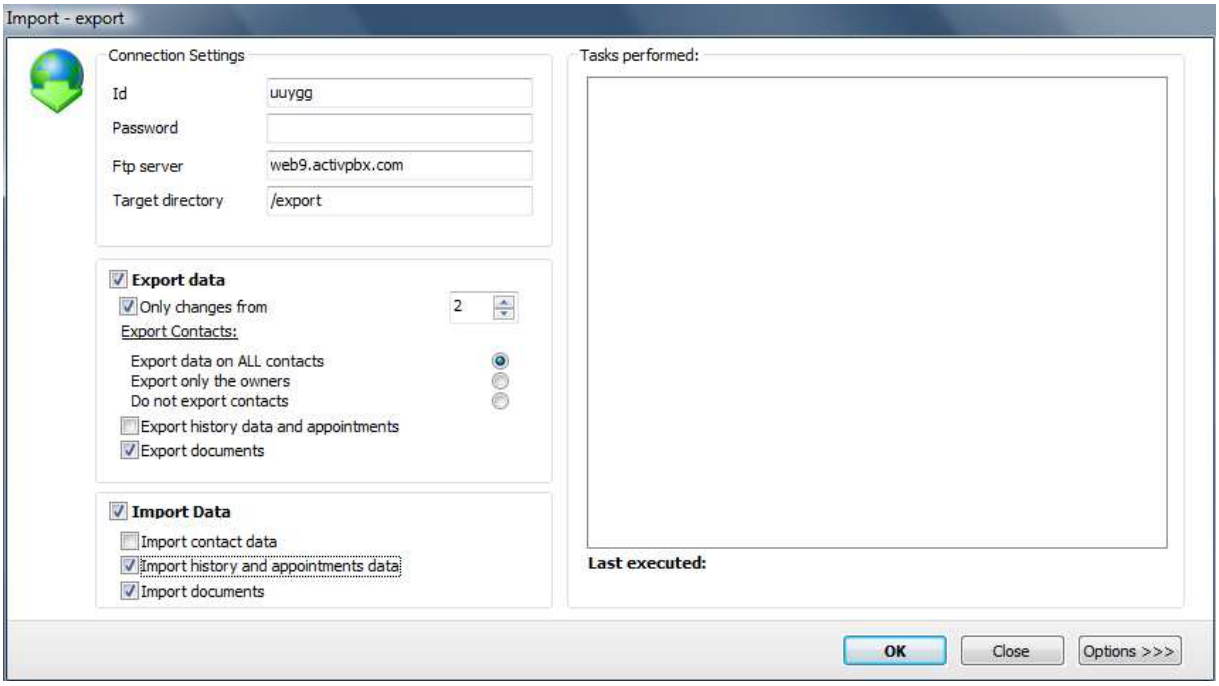
You will then have the possibility to **export data** to another agency or **import data** from another agency.

You can choose to **export** modified data since xx days (by using the arrows to the right of the text '**Only changes from...')**; data concerning **contacts**; **history** and **appointments** as well as associated **documents.**

You can also choose to **import** data regarding **contacts; history** and **appointments** as well as associated **documents.**

All this can be done by checking/unchecking the desired options from the proposed list in the following window.

Once your options have been chosen, click on OK to proceed.



11-**Import a contact from clipboard**: allows you to retrieve the contact's information received by email, without having to re-type the information. Before importing a contact's information from the clipboard, please ensure that each field is associated with a line.

For example: Mr James Bond sends you an email. You will need to copy the data into a text editor (eg: Notepad).

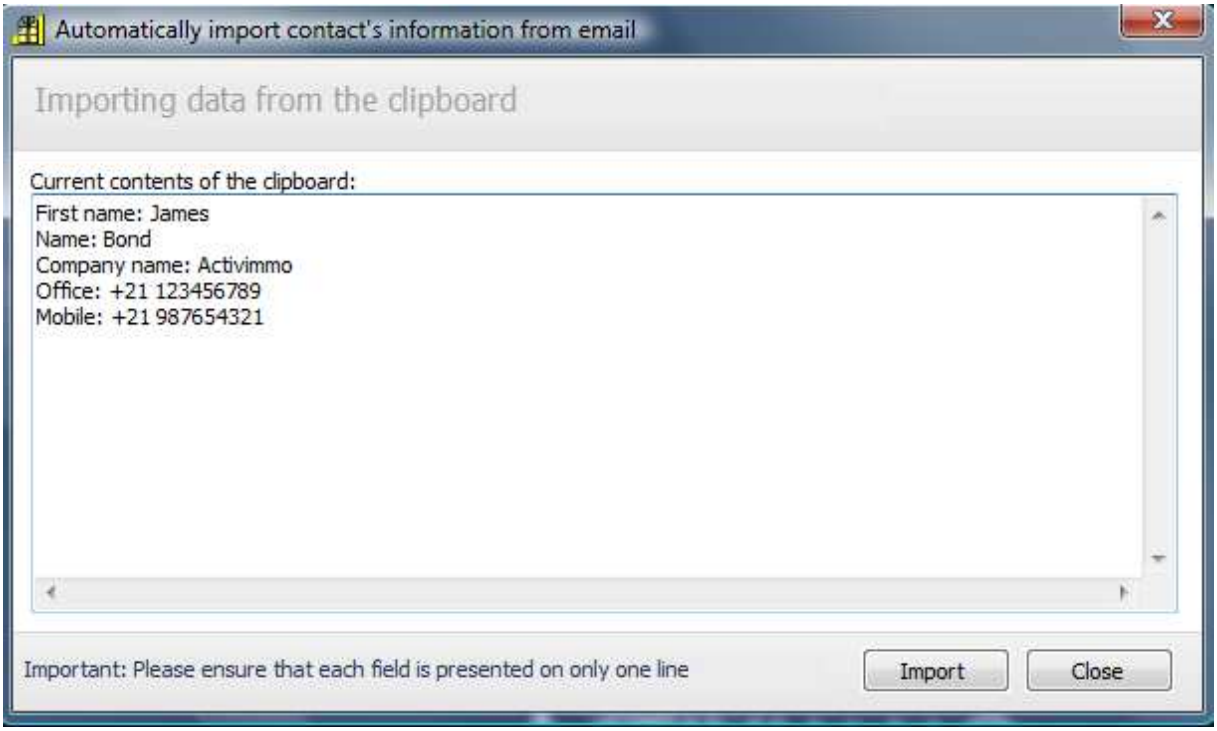
Then, from the **File** menu, select **'Import a contact from clipboard**'.

In the window that opens, you must ensure that each data is presented on one line. You will need to add the corresponding text before the data to allow the software to import the information correctly. In front of the first name of the contact, you will write: First name, same for the Name, telephone etc.

Example:

Surname: Bond

Name: James


Automatically import contact's information from email
Importing data from the clipboard
Current contents of the clipboard:
First name: James
Name: Bond
Company name: Activimmo
Office: +21 123456789
Mobile: +21 987654321
Important: Please ensure that each field is presented on only one line
Import
Close

12-**Import of property listing from clipboard**: allows you to retrieve the property details received by email, without having to reenter the information. Before importing a property from the clipboard, please ensure that each field is associated with a line. (Same procedure as for 'Import a contact' explained above.)

Example:

Address: 12, Coastal Road

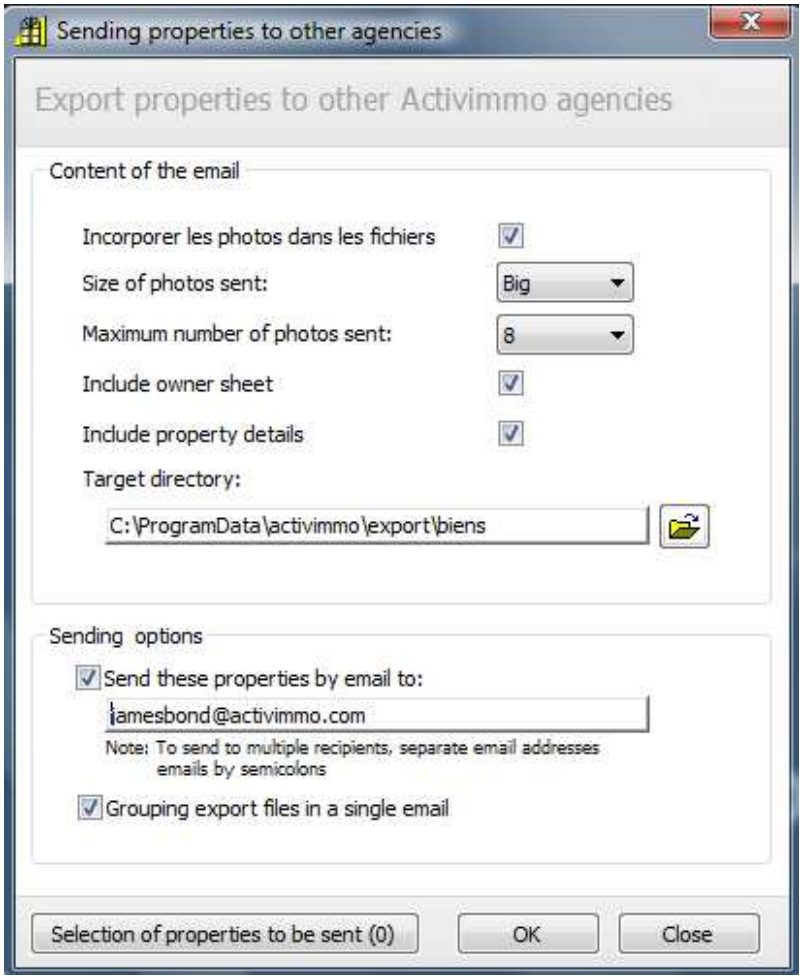
Country: USA

13-**Send properties to another Activimmo agency**: allows you to export all the information about a property to any other agency that also uses **Activimmo**.

You will need to select your options from the top section of the popup window '**Content of the email':** size of photos sent; maximum number of photos; include or not the owner sheet as well as the property details.

You will then need to complete the bottom section of the popup '**Sending options**' by inserting the recipient's email address and choose if you want to group the export files in a single email. Then, click on the button '**Selection of properties to be sent**' to select the properties that you wish to export.

Once done, click OK to proceed.



14-**<u>Import a property from another Activimmo agency</u>**: allows you to retrieve information about a property from any other agency that also uses **Activimmo**.

In the window that opens, select the desired actions by checking/unchecking the boxes from the proposed list:

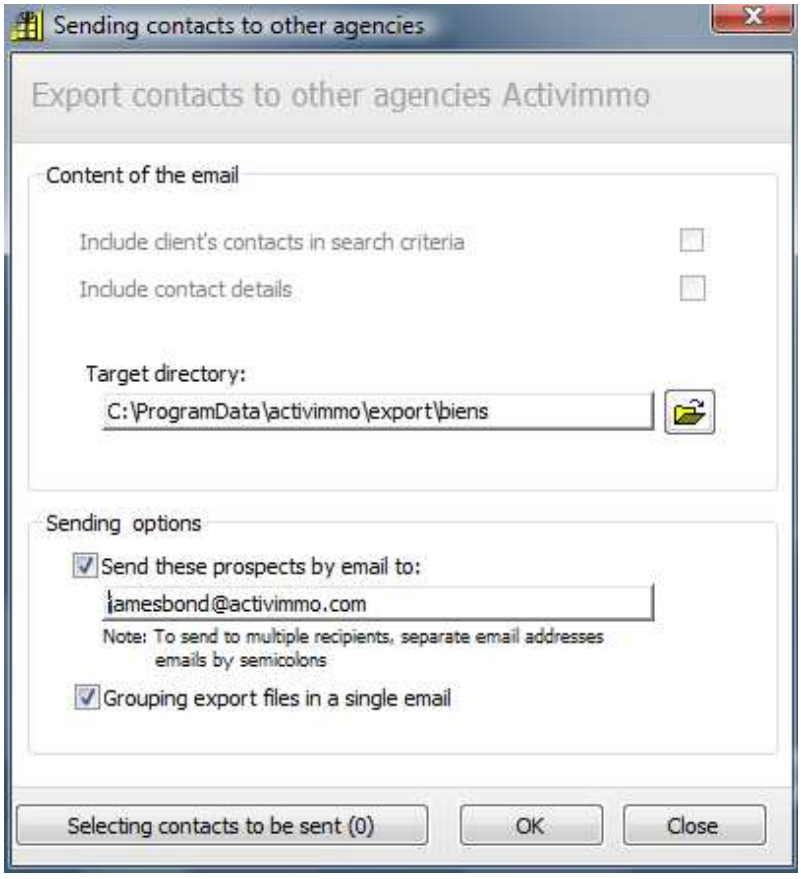
- Keep the original references of imported properties
- Keep the original sales agent
- Keep information about authors and creation/modification dates

<u>Note:</u> You can drag and drop the files to import directly in this window.

Once done, click on **Import.**

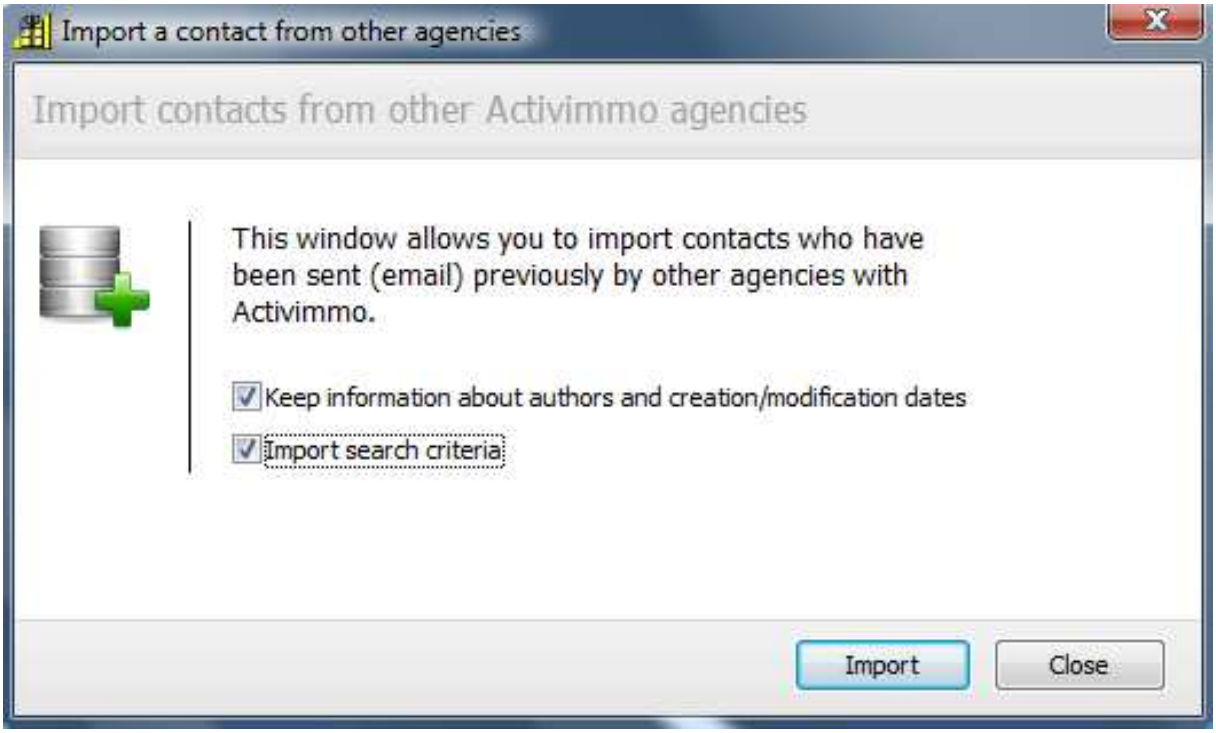
Importing properties from other agencies
Import properties from other Activimmo agencies
This window allows you to import properties which have been sent previously by other agencies with Activimmo.
Keep the original references of imported properties
Keep the original sales agent
Keep information about authors and creation/modification dates
Tip: You can also drag (drag and drop) the file(s) to upload here
Import
Close

15-**<u>Send contacts to another Activimmo agency</u>** : allows you to export all the data of a contact to any other agency that also uses **Activimmo**.
(Same as section 13 described on top: **Send properties to another Activimmo agency)**


Sending contacts to other agencies
Export contacts to other agencies Activimmo
Content of the email
Include client's contacts in search criteria
Include contact details
Target directory:
C:\ProgramData\activimmo\export\biens
Sending options
Send these prospects by email to:
jamesbond@activimmo.com
Note: To send to multiple recipients, separate email addresses emails by semicolons
Grouping export files in a single email
Selecting contacts to be sent (0)
OK
Close

16-**Import a contact from another Activimmo agency** : allows you to retrieve the data of a contact from any other agency that also uses **Activimmo**.

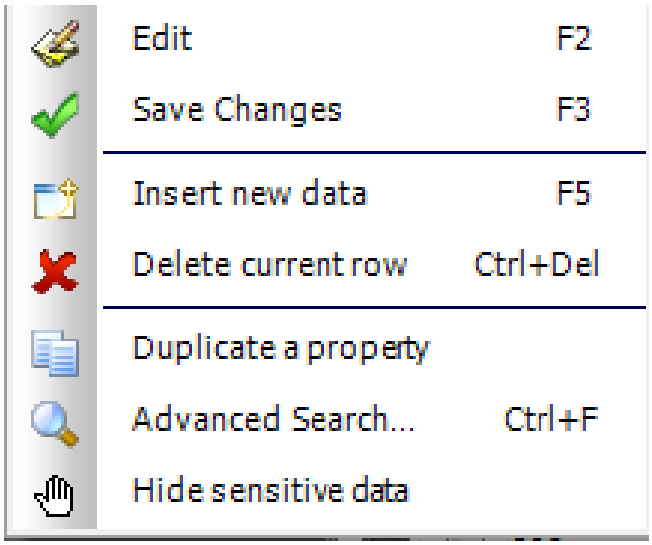
You can choose to keep the information about authors and creation/modification dates as well as Import search criteria for buyers. To do so, you will need to check the boxes from the options offered in the window that opens:


Import a contact from other agencies
Import contacts from other Activimmo agencies
This window allows you to import contacts who have been sent (email) previously by other agencies with Activimmo.
Keep information about authors and creation/modification dates
Import search criteria
Import
Close

17-**Exit**: allows you to exit the Activimmo software.

Edit Menu

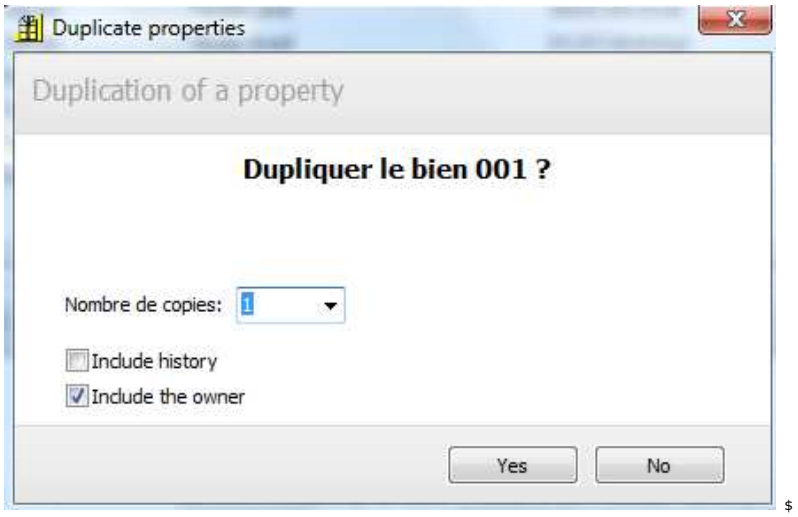
Here is the content of the **Edit Menu**:



The **Edit** menu allows:

1. **Modification** of data, you enter the **edit** mode **(F2)**
2. **Save** changes **(F3)**
3. **Insert new data** (**F5**) or **Delete** (**CTRL+DEL**) selected data (new property, contact or new **Activimmo** user)
4. **Clone (Duplicate)** a property, if for example you have a Duplex and that the information is pretty much the same for both properties. This will save you time as you can avoid having to re-insert the property details from scratch. (Example: address / photos etc…)

You will need to insert the number of copies required and choose if you want to include the history of the property as well as the owner's information by checking/unchecking the boxes in the popup window:



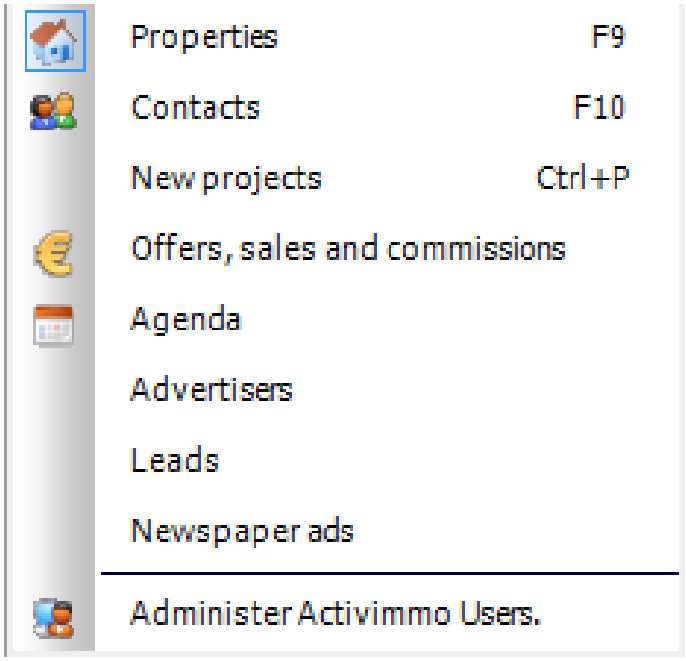
❖ **Note**: **Remember to modify the reference of the duplicated property(ies) and feel free to personalise each one by adding relevant details.**

5. Be more accurate in your search by using the **advanced search (CTRL+F)**. You can add or remove criteria to refine your search.

6. To **show** or **hide sensitive data** on your screen. For example, if you are with a prospect, you would not like him/her to see the details of the owners (name/ address/ etc.) You can therefore choose to hide this information.

Management Menu

The **Management menu** is the key menu in **Activimmo** as it lists and provides access to the various windows. You can access all the data managed by the application through this window.



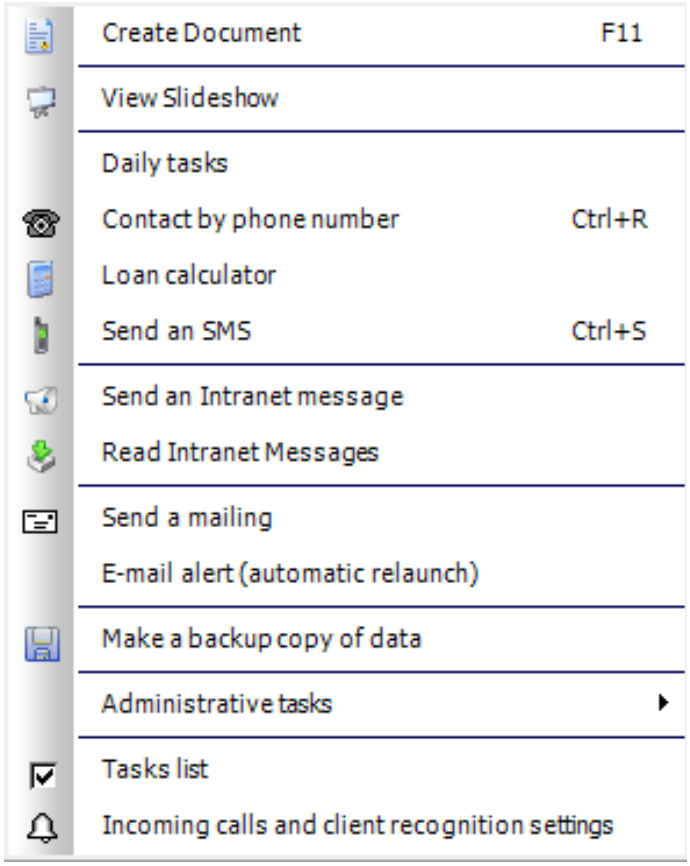
You can find all the information about:

1. **Properties (F9)**
2. **Contacts** (owners/ buyers / suppliers /etc.) **(F10)**
3. **New projects** (Real estate promotions,…) **(CTRL+P)**
4. **Offers, sales and commissions** [concerning properties]
5. **The agenda** (multi-users)
6. **Managing advertisers, leads and newspaper ads** [ads on internet portals or newspaper ads (newspapers, magazines…)].
7. **Administer Activimmo users** (allows **Activimmo** users to manage their access rights and their information.)

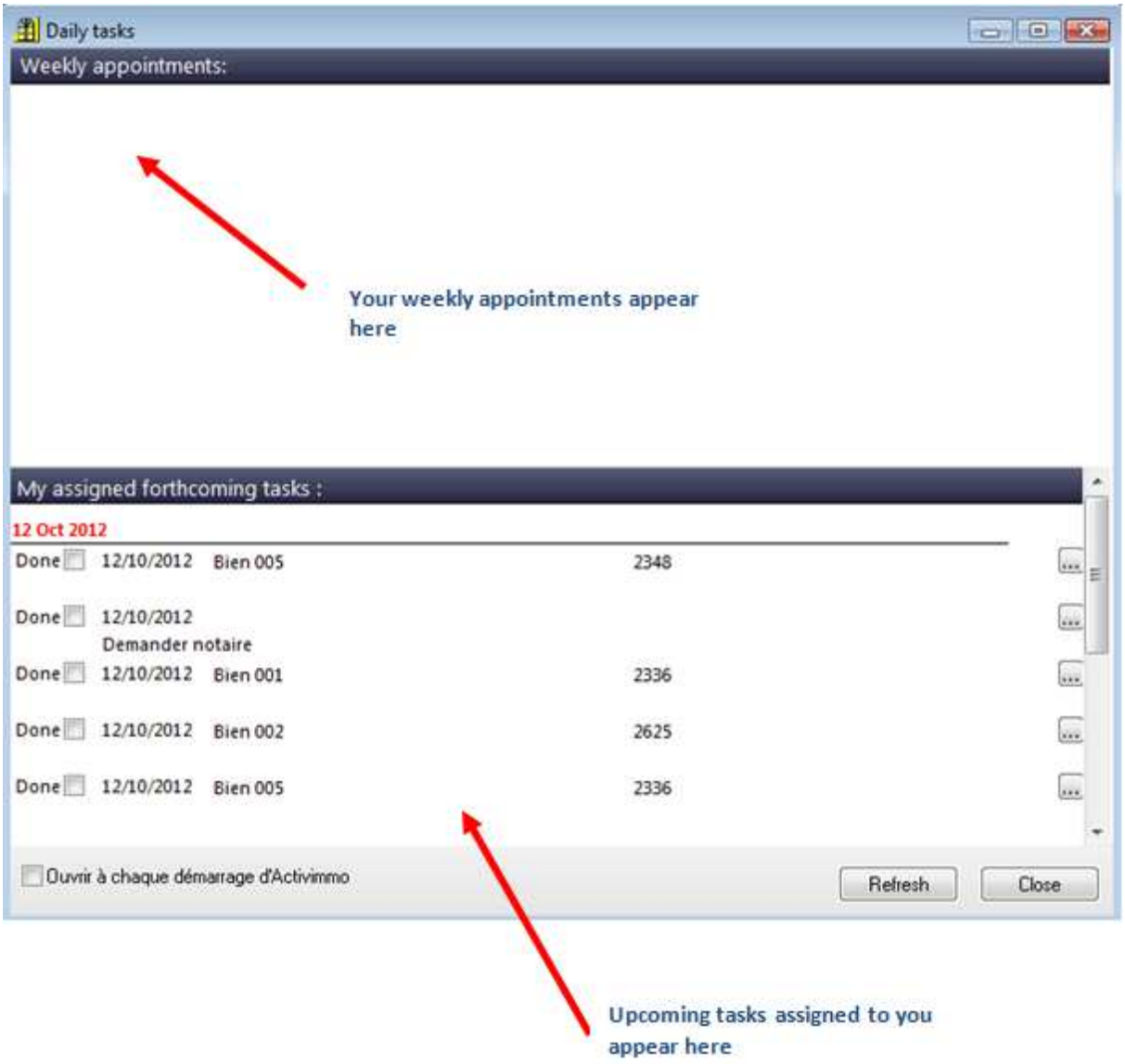
Tools Menu

The **Tools menu** is another important **Activimmo** menu, it provides access to a wide range of utilities such as a loan calculator in euros and a currency converter (**Calculate a loan**), **search by phone number**, sending **SMS**, **documents** creation; it can also perform **automatic relaunches** and **launch a slideshow**. You can also **send or read your intranet messages** and keep an eye on your **task list**.

Here is the Tools menu:

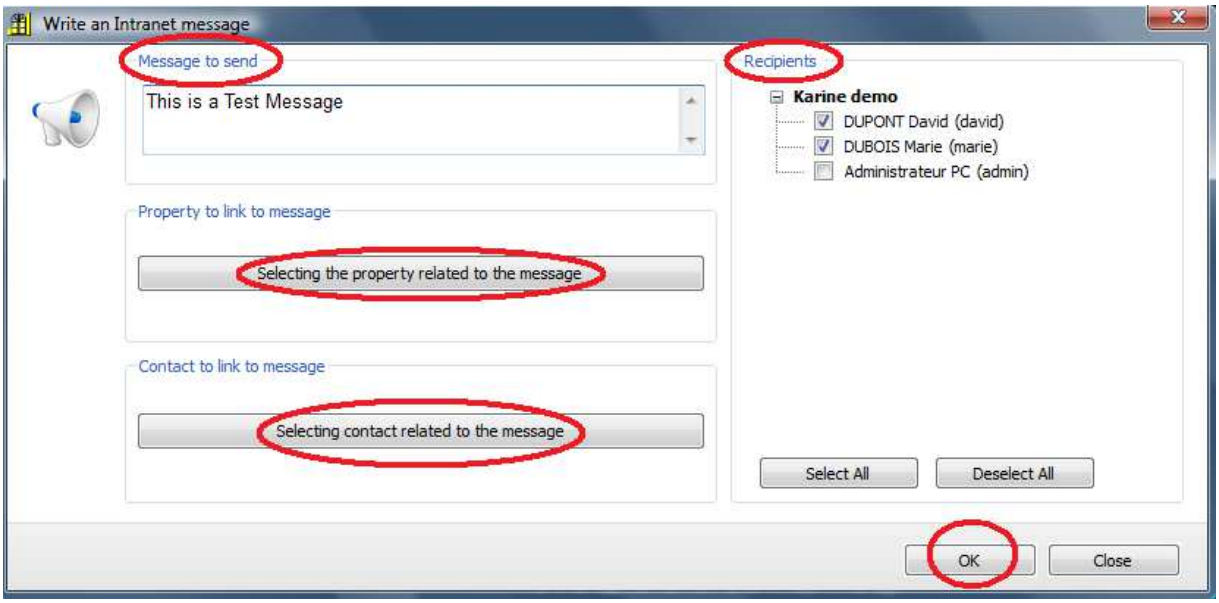


➔ The **Daily tasks** option allows you to view a list of your weekly appointments and the upcoming tasks assigned to you.
Click on a property reference to view the property information. (The property window will open on your screen).



➔ **<u>Send an Intranet message</u>** allows you to send a message to your work colleagues. To do so, you need to:

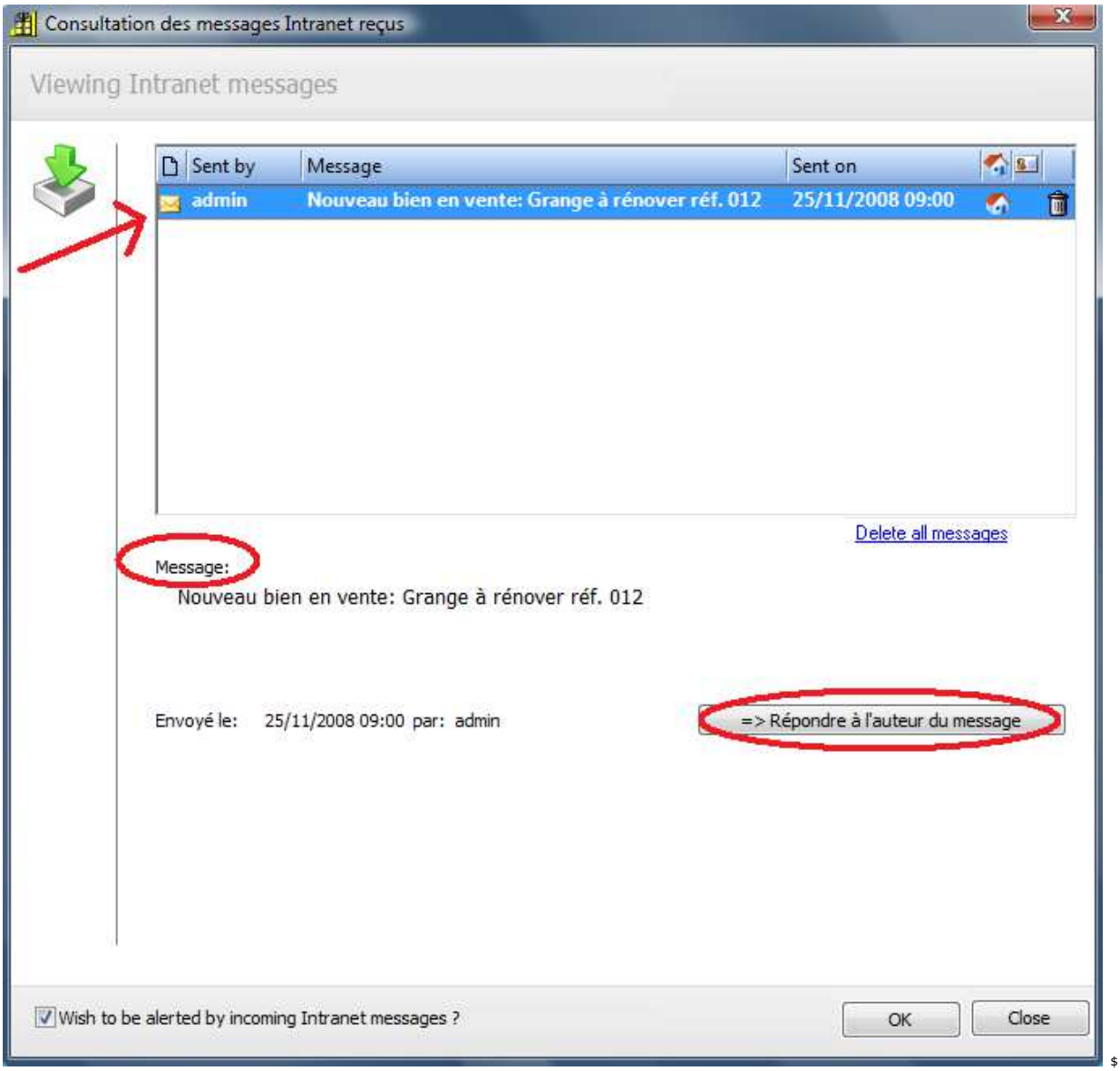
1. **Write** the **message** in the text box
2. Click on '**Selecting the property related to the message**' and choose a property. Once done, you will notice that the property details now appear in this section.
3. Click on '**Select contact related to the message**' and choose a contact.
4. Choose a **recipient** by ticking the box next to their name (on the right hand side of the popup).
5. Click **OK** to validate and your message will be sent.



➔ **Read Intranet messages**

– Click on this option to view messages received via the Intranet.

- To **view the message**, click once on the row of the message and the content will appear.
- To **reply to an Intranet message**, click on ‘Reply to the message’. A window will open and you will need to insert your message and select a property as well as a contact (As explained on top: **Send an Intranet message**)
- To **delete an intranet message**, double click on the bin icon on the row (on the right of the message).
- To **delete all intranet messages**, click on ‘Delete all messages’.
- Click **OK** once you are done.



➔ **Send a Mailing**

This option allows you to send a mailing to a range of contacts at once. This includes newsletters; greetings; messages, activity reports, birthdays, etc.

To do so, you will need to:

- **Insert** the text for the **subject** of the mailing.

- **Add** the email **message content** (using a template)

- **Add an attachment** (or more) if any

- **Select the recipient(s)** using the button 'Select recipients'

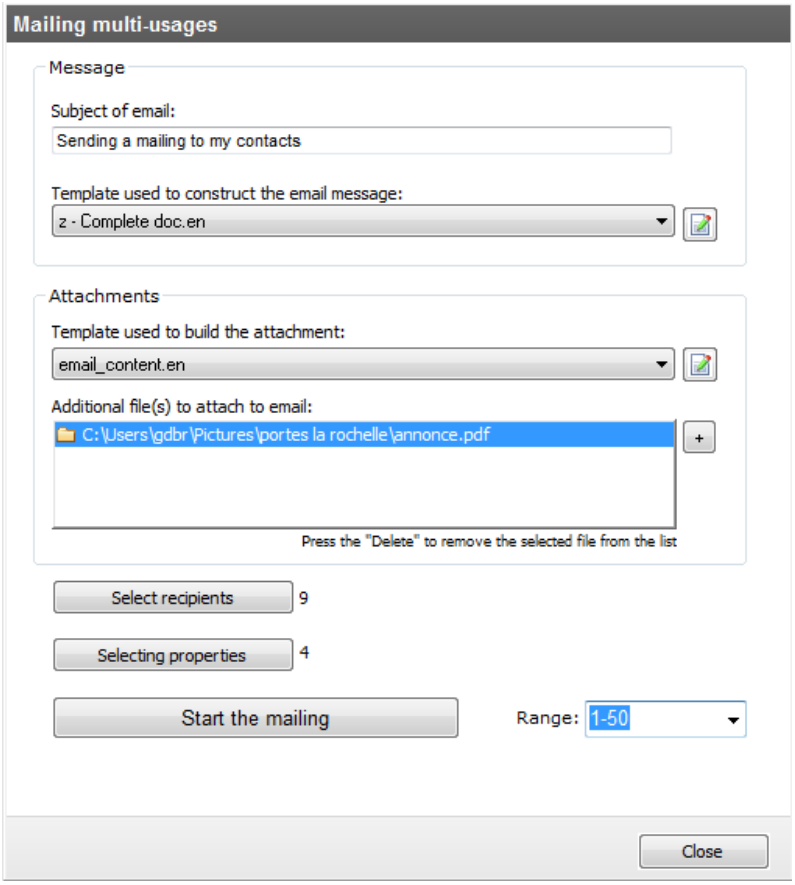
- **Select the property(ies)** using the button 'Select properties'

- **Choose a range** for your mailing. You can choose to send the mailing to all your contacts at once or you can choose a range.

For example: You can send the mailing to the first 50 contacts in your database by selecting '1-50' in the range roll over.

NOTE: If you choose to send a mailing to ALL your contacts, your PC might slow down depending on the amount of contacts you have in your database and also, it will depend on your internet connection.
We therefore advise you to send big mailings before leaving the office at night.

- Once ready, click on '**Start the mailing'.**

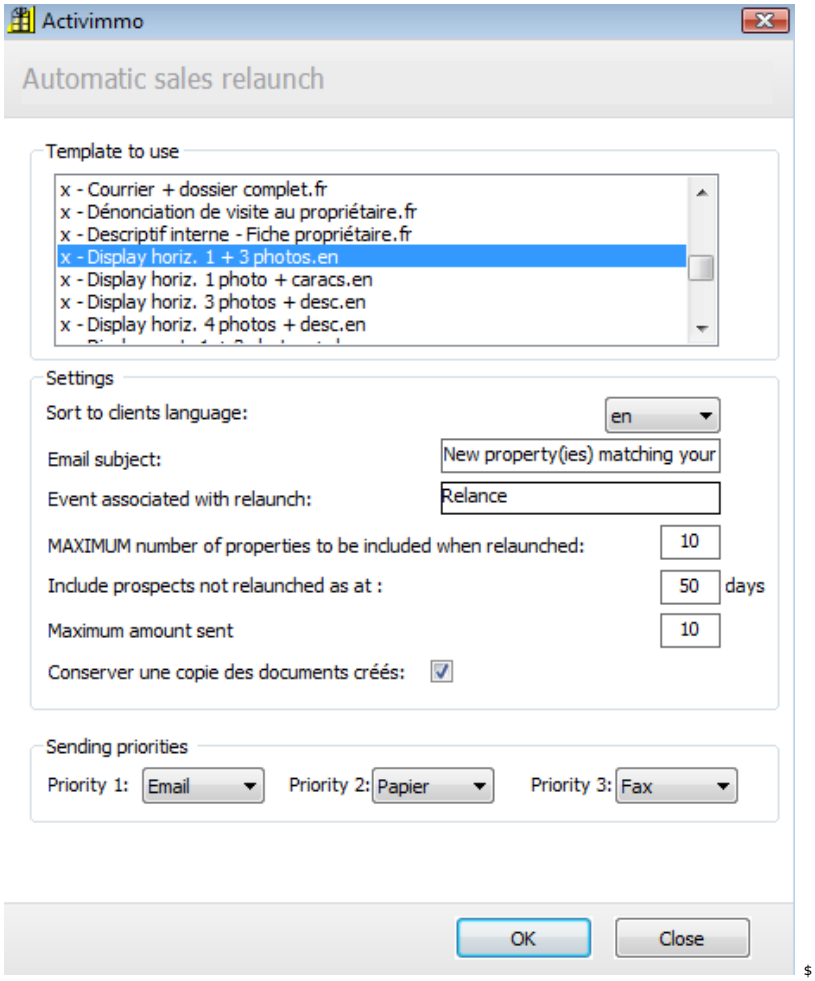


➔ **<u>Email alert (automatic relaunch)</u>** allows you to relaunch your prospects automatically.

<u>You will need to:</u>

- **Select a document template** to be used
- **Adjust the settings** (sort to clients language/ Add the text for the email subject/ select the event associated to the relaunch (Relaunch/ Appointments/...) etc.
- **Choose the sending priorities** (email/ paper/ fax,..)
- Once done, click on **OK** to send the relaunch email to your contacts.

<u>NOTE</u>: If prospects have already been relaunched, **Activimmo** will warn you about it.


Activimmo
Automatic sales relaunch
Template to use
x - Courrier + dossier complet.fr
x - Dénonciation de visite au propriétaire.fr
x - Descriptif interne - Fiche propriétaire.fr
x - Display horiz. 1 + 3 photos.en
x - Display horiz. 1 photo + caracs.en
x - Display horiz. 3 photos + desc.en
x - Display horiz. 4 photos + desc.en
Settings
Sort to clients language:
en
Email subject:
New property(ies) matching your
Event associated with relaunch:
Relance
MAXIMUM number of properties to be included when relaunched:
10
Include prospects not relaunched as at :
50
days
Maximum amount sent
10
Conserver une copie des documents créés:
Sending priorities
Priority 1:
Email
Priority 2:
Papier
Priority 3:
Fax
OK
Close

➔ **<u>Administrative tasks</u>** – allows you to do various tasks such as:

- Retrieve GPS coordinates (works with Google Map)

- Refresh data in the cache memory

- Manage files and data

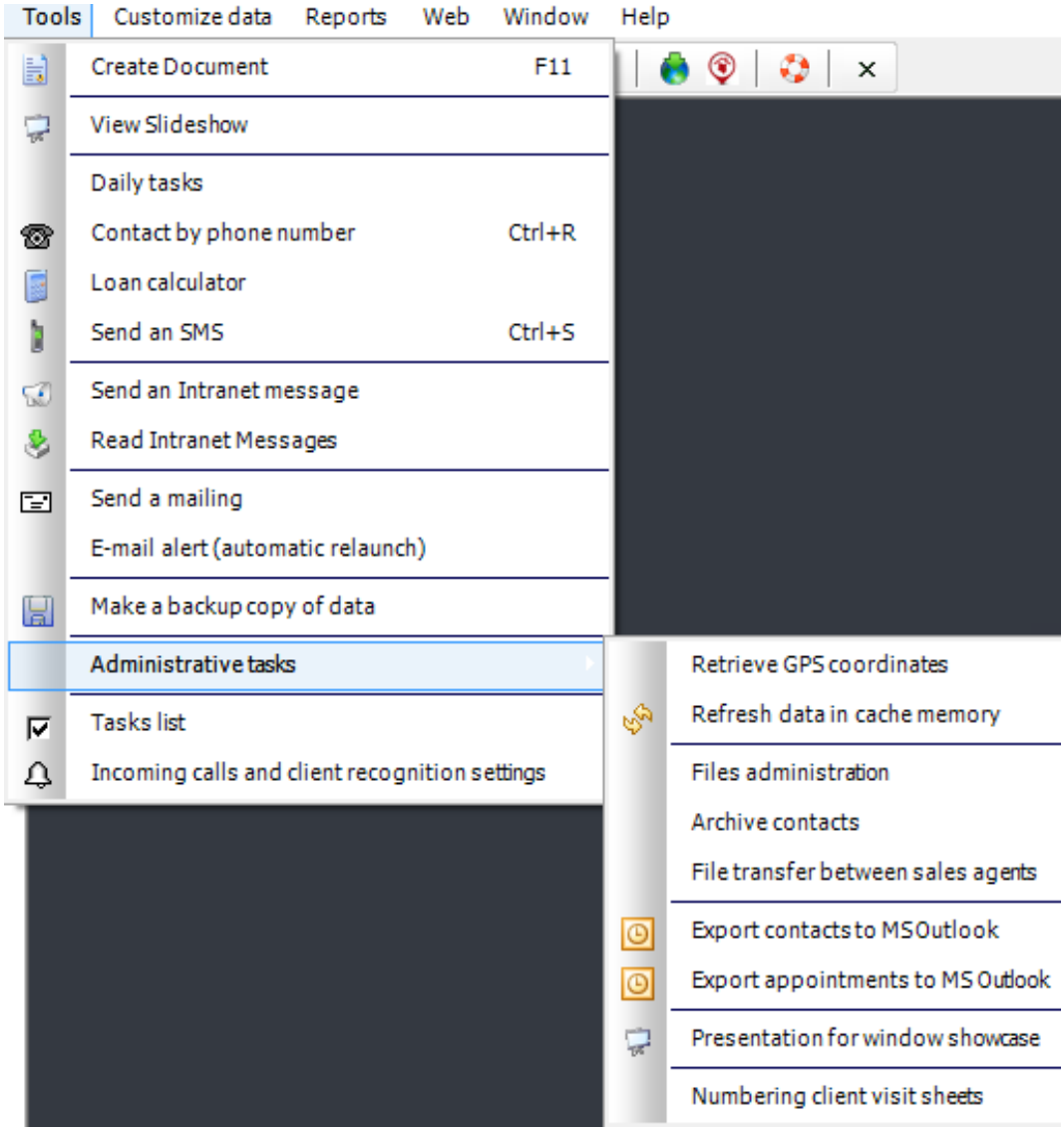
- Archive contacts

- Transfer files between sales agents

- Export contacts & appointments to MS Outlook

- Prepare & create a slideshow file for window showcase

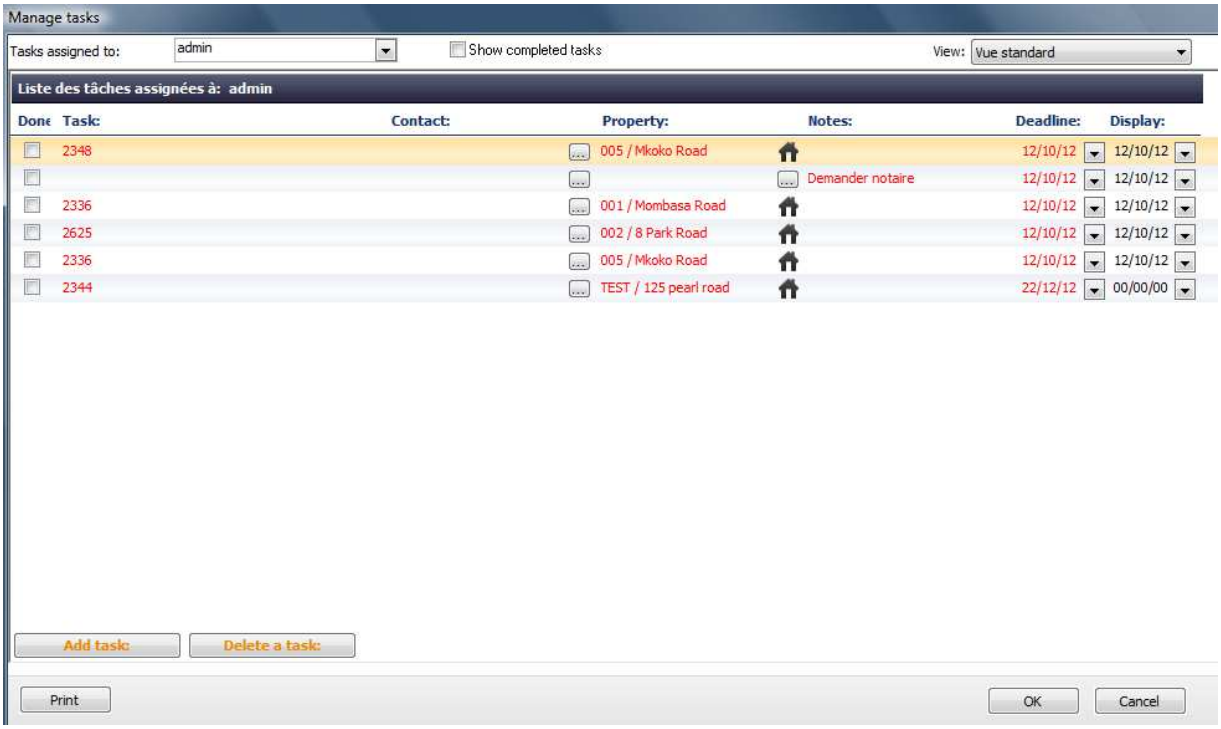
- Numbering client visit sheets



➔ **<u>Tasks list</u>** – allows you to access the task management window where you will be able to view **tasks assigned to each user**.

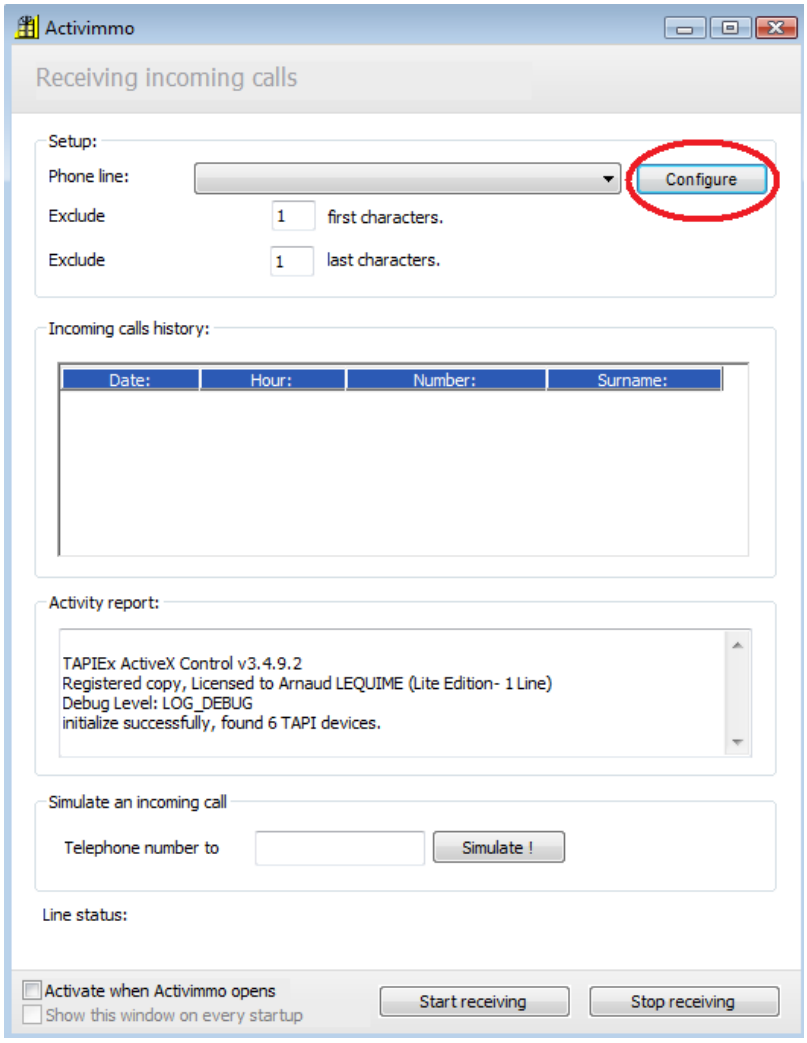
You can also choose to view the completed tasks by ticking the box next to '**Show completed tasks'.**
Do not hesitate to select the view you wish to use to manage tasks. All this can be done using the roll over over menus on top of the window 'Manage tasks'.

From this window, you can not only **add** or **delete tasks** but you can also **print** the list in a single click on the button 'Print'.



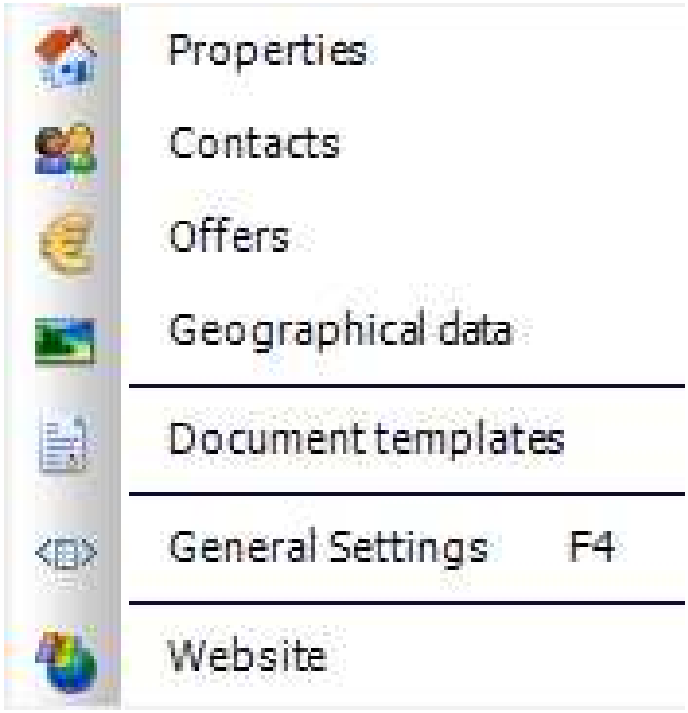
➔ **Incoming calls and client recognition settings** $

This feature allows you to receive incoming phonecalls in **Activimmo**. To do so, you will need to adjust the **phone line** settings by clicking on the '**Configure'** button.
Incoming call history and **Activity report** are also found on this window so that you don't miss out on opportunities.
Use the '**Simulate'** button to see how it will look like when you receive an incoming call.
Once your settings are adjusted, click on '**Start receiving'**.
Note that you can stop the incoming phonecalls at any time by clicking on the button '**Stop receiving'**.



Customize data Menu

Here are the contents of the Customize data menu:



It is also an important menu in **Activimmo**, it allows:

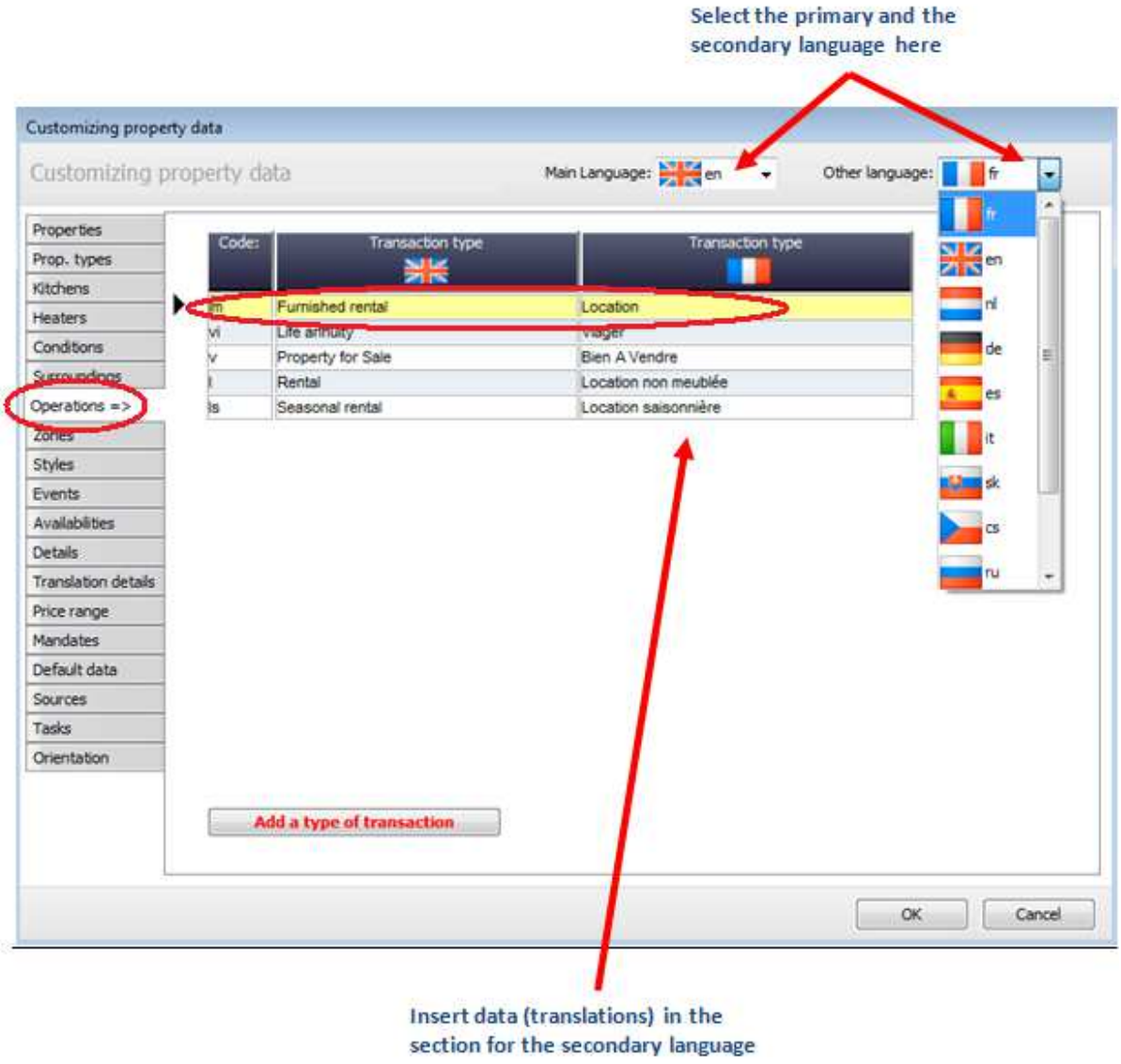
1. Customization of **properties** through various options such as adding details and categories.
2. Customization of details and events related to **contacts**.
3. Customization of data on **offers** (task/ status/ commissions etc.).
4. Customization of **geographical data** of properties and contacts.
5. Creation or modification of **documents templates** which are then accessible for use when creating new documents.
6. Customization of **general settings** (that is the data specific to your agency or agencies in your network.)
7. Customization of your **Website** (menu, choice of logo, foreign languages used, etc.) You can also choose the keywords used in the ranking of your Website on internet.

Note: From this menu, you are able to translate and insert data in various languages offered by **Activimmo**.

Example: **Customize data – Properties**

When the window opens, the first thing to do is to select the primary language and the secondary language using the arrow (near the flag) to open the roll-over menu. Then, if you want to update the translation into the second language, just click on the text, delete it and replace it with the translation of your choice.

In our example, under section **'Operations'**, for **'Location'**, you would probably want to update the text, in French, to `**Location non meublée'** instead of 'Location'. You will need to click on the text 'Location', delete it and insert ' Location non meublée' instead. When you are finished, click OK to confirm.



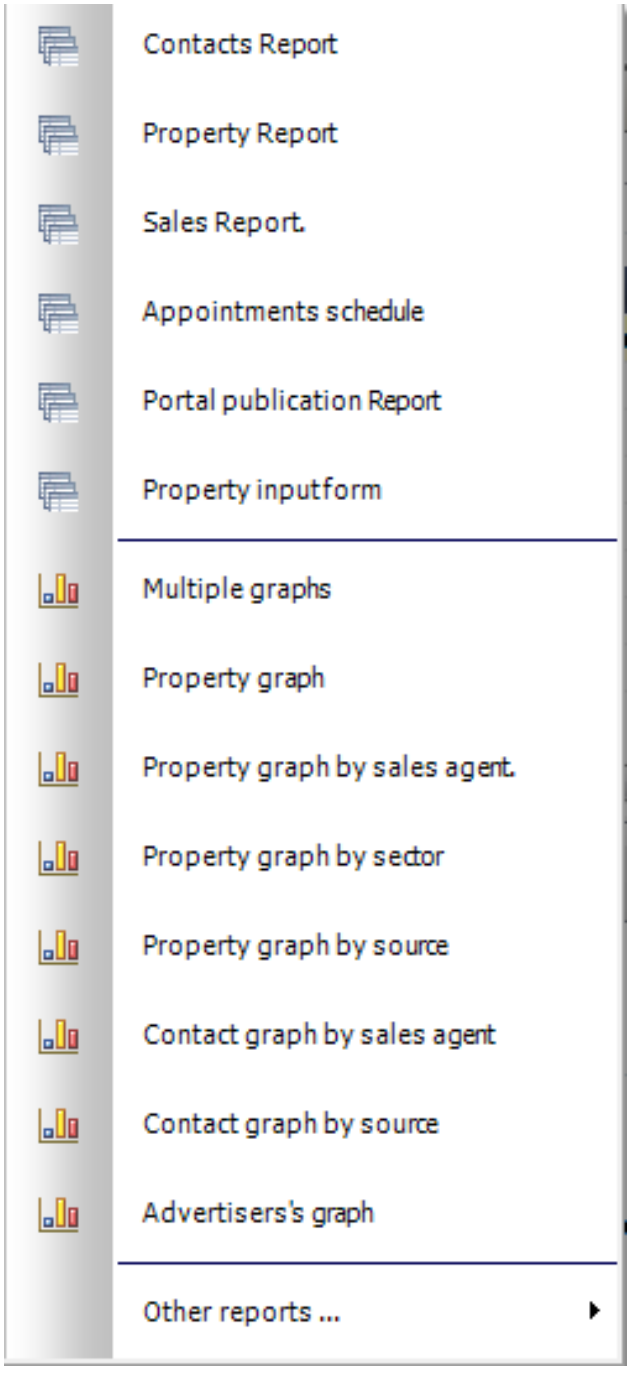
Reports Menu

The **Reports menu** aims to issue activity reports and complete lists concerning your data (**property listings, mandates, sales, contact listings** and **search criteria**) in the simplest possible way. You can then print these reports.

This menu also enables you to access **sales agent's statistics** and view the appointments schedules (**Agenda**).

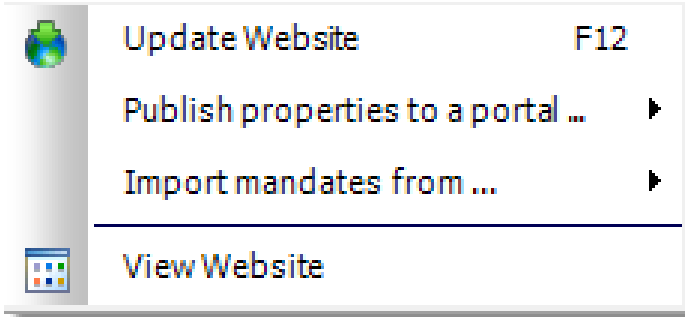
The property input form allows you to obtain a detailed input form to print when you visit a new property.

You are also able to view reports on **graphs** (Property graph, by sales agent, by sector, etc.)



Web Menu

The **Web menu**: allows the customization and sending of your Website to Internet. It looks like this:



This menu is a real Website generator, allowing you to customize your Website by adding new pages

Here is its description:

1. **Update Website (F12)**: allows you to send your Website to Internet.

2. **Publish properties to a portal:** allows you to publish your properties to an online real estate portal.

3. **Import mandates from:** allows you to retrieve mandates from real estate portals.

4. **View Website**: allows you to view your Website when you are connected to Internet.

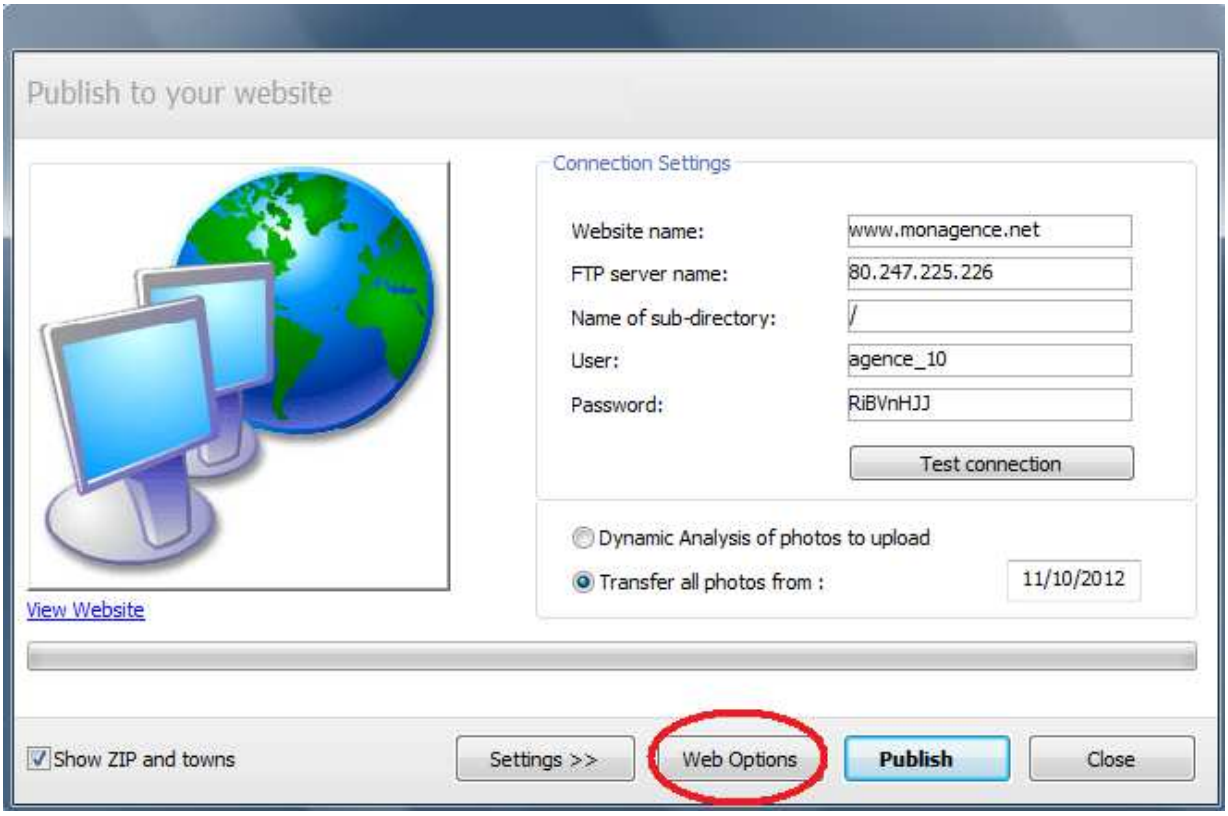
➔ Update Website

We offer you the possibility to update your Website directly from **Activimmo**.

To do so, from the **Web menu**, select '**Update Website'** or simply use the keyboard shortcut **F12**.

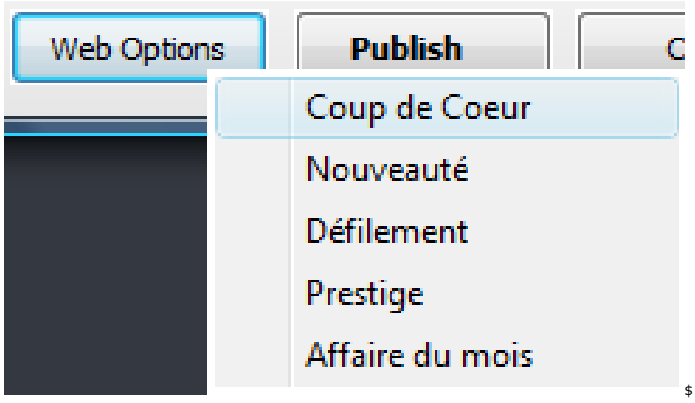
The '**Publish to your website'** window opens. The connection settings will have to be inserted at first use.

[An Activimmo technician will help you to configure these settings.]



Click on '**Web Options**' to select the properties that you want to highlight on your Website (under each category below):

- **Coup de Cœur**
- **Nouveautés**
- **Défilement**
- **Prestige ou**
- **Affaire du mois**



When you click on the categories, the '**Selecting Properties'** window opens.

Select a property by double clicking on the property row. Notice that it will move to the bottom section '**Selected Properties'.**

Click '**OK**' to confirm your selection.

Note: You can select more than one property by double clicking on each property row or you can use the blu arrows:

➔ The single arrows are used to select / deselect **properties one by one**.

➔ The double arrows are used to select / deselect **all properties at the same time.**

Before publishing your properties to your Website, please check the date in the section: **'Transfer all photos from'**.

Often this date is automatically updated with today's date and it should be changed depending on when the last update of your Website was carried out.

Example: You update your Website on the 10th December. On the 15th December, you decide to update your Website again.

Before publishing, you will therefore need to check that the date that appears in this section is the 10th December and not the 15th December.

In doing so, you ensure that photos of new properties that have been inserted between the 10th and the 15th December are taken into consideration by **Activimmo** and are uploaded before being published on the Website.

Note: The first time you upload the photos to be published to your Website, there might be a delay as **Activimmo** needs to scan and upload all photos that are in your database. Once this is done, try to avoid entering a date that is far back to avoid having to wait for the software to scan everything again and upload the photos. (This might also take longer depending on your internet connection).

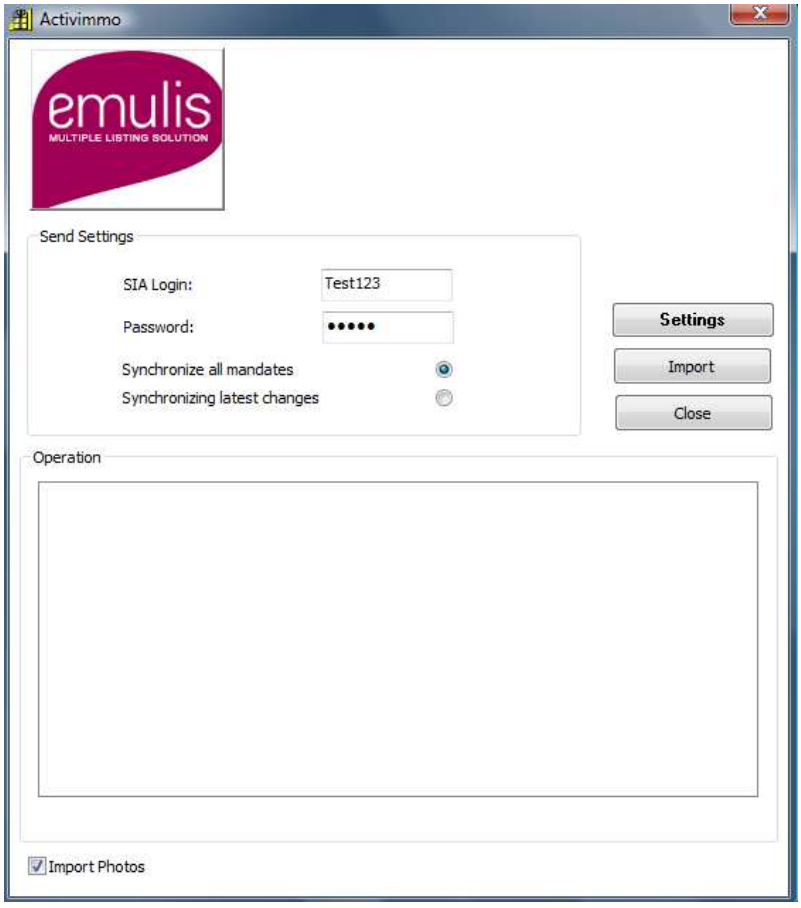
Once you are done, click on '**Publish'.**

➔ Import mandates from

This function allows you to retrieve / import data from other real estate databases.

In France and Belgium for example, they use EMULIS. Note that you need to be a registered member to benefit from these services.

This service allows agencies to automatically retrieve data on other properties that are shared through this service. For more information, agencies must visit: http://www.emulis.net/



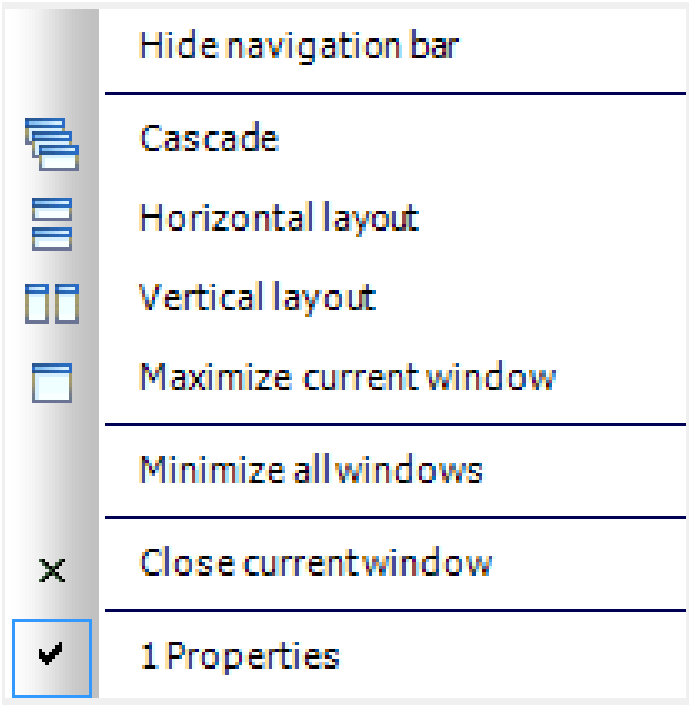
Once you are registered, you are given a **Log in** and **password** that you will need to enter in this window to be able to proceed.

Then you will be able to **synchronize** and **import mandates** from their database.

You can also choose to **import photos**. This is done by checking the box 'Import photos' in the bottom left hand side of the popup window.

Window menu

The **Window menu** looks like this**:**



Description of the various options:

1. **Cascade**: Organizes the windows on top of each other.
2. **Horizontal layout**: Organizes windows one above the other.
3. **Vertical layout**: Organizes windows next to each other.
4. **Maximize current window**: expands the current window.
5. **Minimize all windows**: reduces all open windows.
6. **Close current window** : closes the active window.

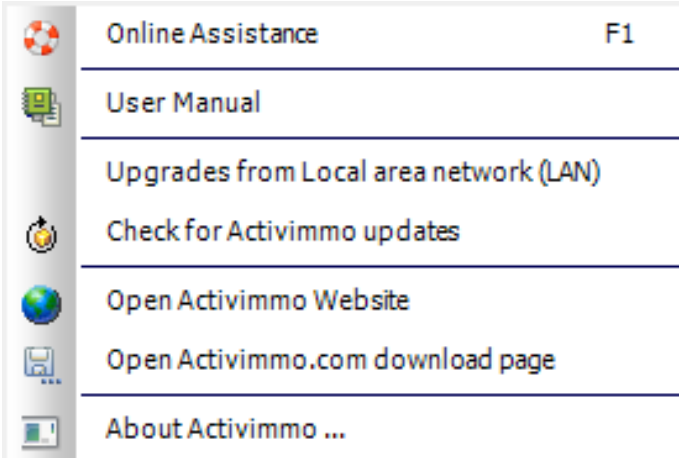
❖ **Note**: Through this menu, you can also choose to show or hide the navigation bar.

Help menu

The **Help menu** allows you to:

1. Access to the **online assistance** (**Team Viewer**) – **F1**
2. Browse through the **User Manual**
3. **Upgrade** your local area network as well as **Activimmo**.
4. Access **Activimmo Website.**
5. **Download Activimmo** maintenance files

The Help menu looks like this:



Method of use

Activimmo uses different modes of operation for data management safety. There are **two main modes**:

1. **View Mode**: In this mode, it is not possible to modify data. Indeed, in viewing mode, the fields in the property, contact or advertisers forms are not available for input. The data is shown in bold. To insert new data in the various tabs, you must switch to **edit mode**.

2. **Edit Mode (F2)**: It is also accessible via **«Edit»** from the **Edit menu** or via the second line of the vertical menu (sidebar) in the property and contacts window.

This mode allows you to **add** or **delete information** about the selected object (which can be for example, a property, a contact, an advertiser or a sales agent).

❖ **Note**: To save modifications made, you can:

- Use the keyboard shortcut **F3**.
- Click on «**Save changes**» from the **Edit menu.**

Then **select another property, contact** or **advertiser** and your changes will be automatically saved.

Manage Properties

The property window allows the advanced management of properties in an easy and efficient manner.

To open the property window, click on the left vertical menu (sidebar) **Properties** or select **Properties** from the **Management** menu or use the keyboard shortcut **F9.**

This page consists of:

1. The properties table

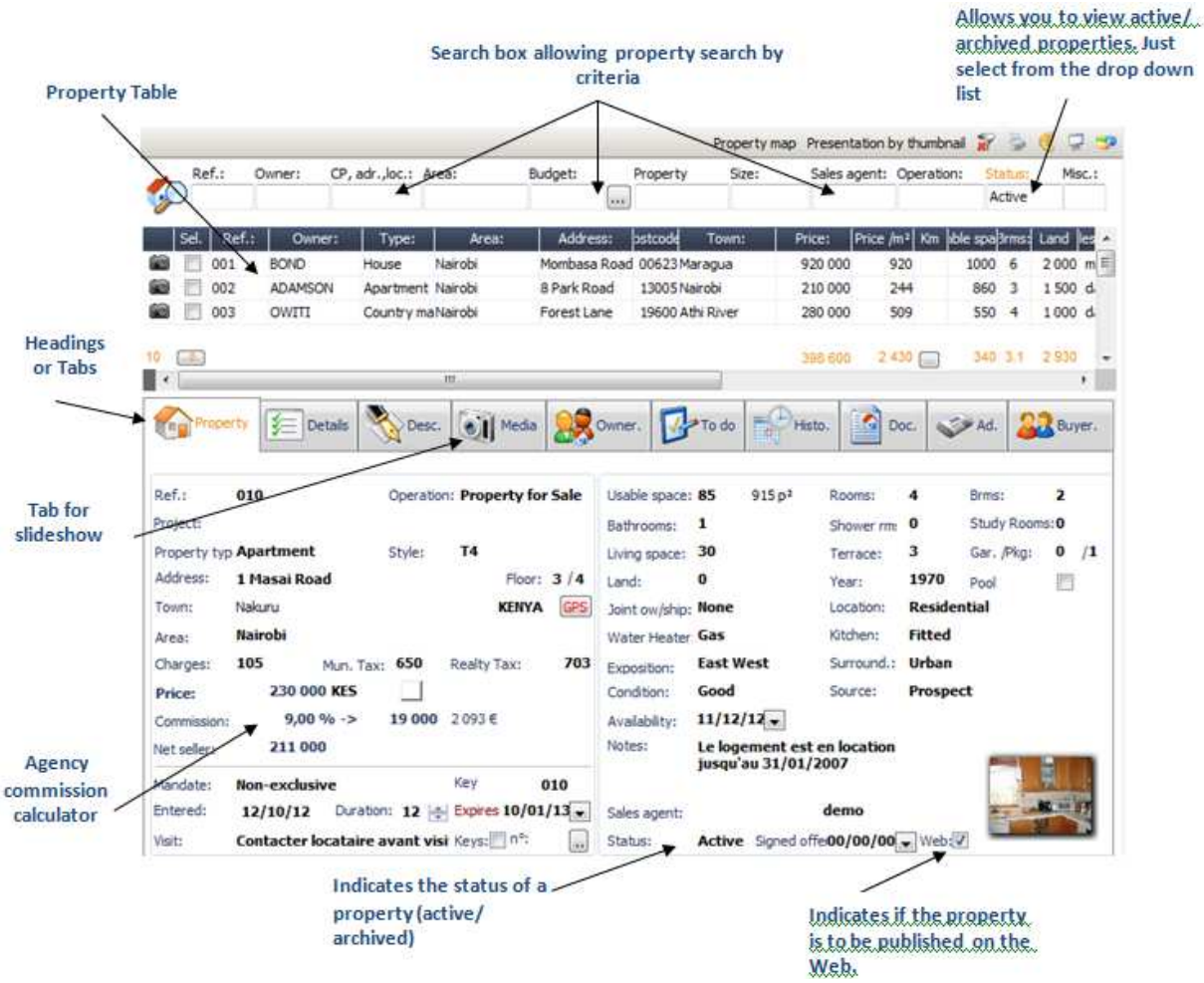
2. Various property **search zones** on top of the window. Note that these criteria can be combined and will be created based on your properties. For example, if no property is of type «House», you will not have the criteria «House» in the search box **Property Type (Prop. Type).**

3. One box to check to **publish** the selected property **to the Web**.

4. View property photos automatically (**Slideshow**). This can be accessed by clicking the option "**View Slideshow**" in the left vertical sub-menu (sidebar) under **«Actions»**.

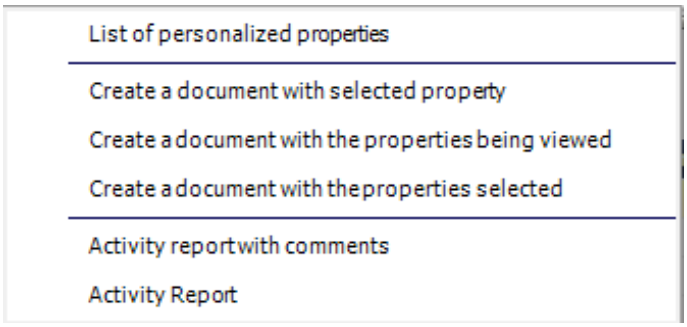
5. 10 headings (Tabs **Property, Details, Description, Media, Owner, Tasks, History, Documents, Ad, Client**).

6. A **print button** for documents related to properties.


Allows you to view active/ archived properties. Just select from the drop down list
Search box allowing property search by criteria
Property Table
Headings or Tabs
Tab for slideshow
Agency commission calculator
Indicates the status of a property (active/ archived)
Indicates if the property is to be published on the Web.

This **button** allows you to create customizable property **reports.** You can sort them by **type, price, owners**, etc.

You can also **create documents** for the selected property(ies). You can then send them by **email, print**, export to **PDF** and export to **Word**.


List of personalized properties
Create a document with selected property
Create a document with the properties being viewed
Create a document with the properties selected
Activity report with comments
Activity Report

Note that proposed documents available via this command can not be modified. If you want to print customizable

documents, you need to select **Documents templates** from the **Customize data menu**.

For adding new properties, simply select **New Property** from the **File** menu or click **«Create a property listing»** from the vertical menu (sidebar -under **Properties**) or use the keyboard shortcut **Ctrl+F9**

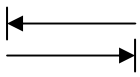
When creating a new property, a window opens and prompts you to use the **wizard**.

❖ **The wizard** The wizard successively gives access to all input fields to create a property, such as the **property data sheet** but also a **detailed sheet** regarding the different rooms, the input sheet for the title and the text for the **publication of ads**, the **photos insert** page and finally to the general information sheet concerning the **property owner**.

If you do not use the wizard to create your property, only the general information input window appears on the screen.

It is therefore recommended to always use the wizard.

✓ **Tip:** to move from one data (field) to another in the windows, you can use the keyboard with the tab key. This button looks like this:



➢ **Property** Tab:

It provides all the characteristics of the property, such as the property type, its condition, the sale or rental price, etc.

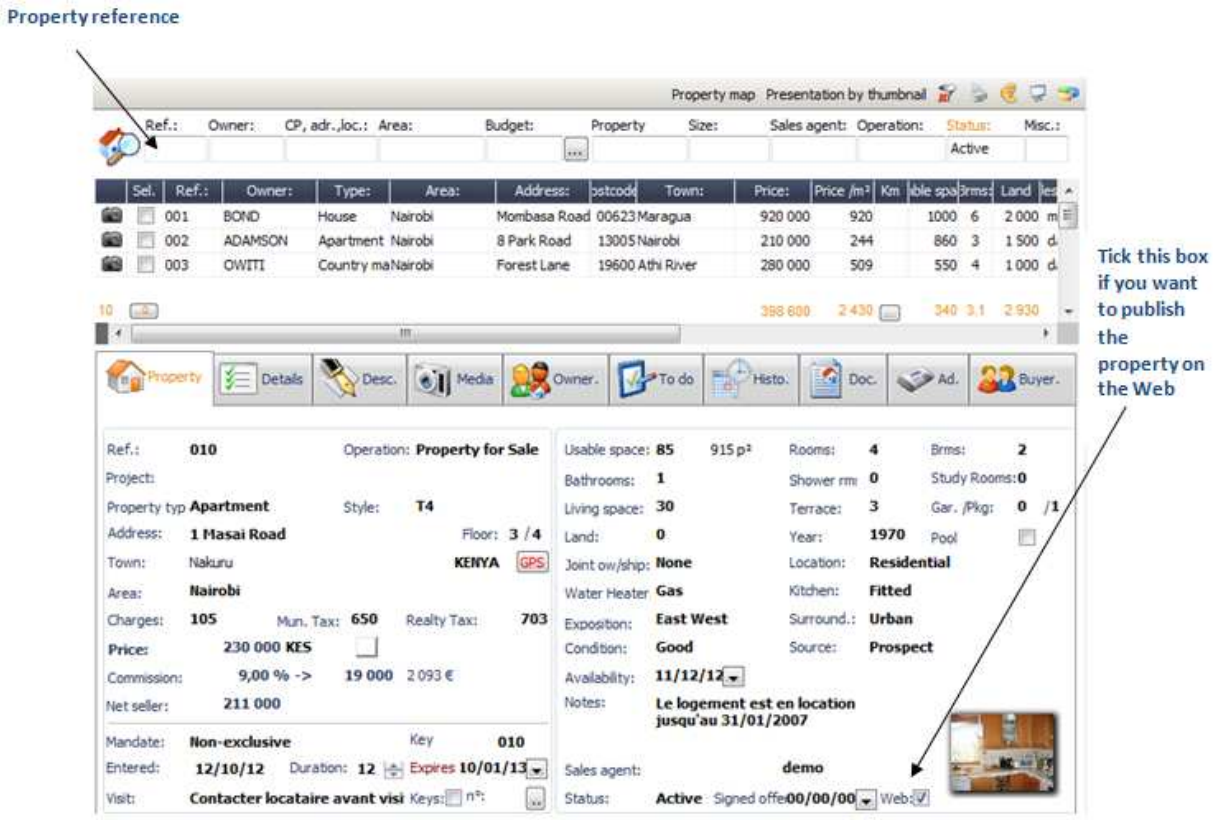
If the vast majority of input fields it is not necessary to provide an explanation, it is still important to insert the following:

1. The **Reference** is the name under which you will find the property in the **property table**.

2. The **sales agent** information outlines the agency employee who looks after the property.

3. To publish a property on Internet, just check the box **Web**. If you want to publish a property on the Web, you must create the complete text for the ad in the **Desc.** Tab.

4. To archive a property, you must change the **status** of the property to **Archived.** Thus, the property will not be available for viewing on the Web anymore. You can still view it in **Activimmo** by selecting the box **«Archived»** in the search box at the top of the page under **'Status'**.



➢ **Details** Tab :

Allows you to view and detail the characteristics of the property that will be included in the property Web ad (for example details of the rooms located on the ground floor, 1st floor, etc.)

To add new characteristics, click on **«Add details about the selected property»** (bottom of page).

➢ **Desc.** Tab (description):

Allows you to describe the property, these descriptions will be automatically included in the paper ads publications and on the Web.

❖ **Note**:

- The **Title** is is the name under which the property can be found on the Web page of your agency.

- The **Short ad/web text** will be included in the published ads.

- The **Detailed ad text** will be included in the property ad text on the Website only.

❖ **Note**: the button «**Edit the detailed ad text**» (button on the right of the detailed ad text) allows you to write text using '**Word'**.

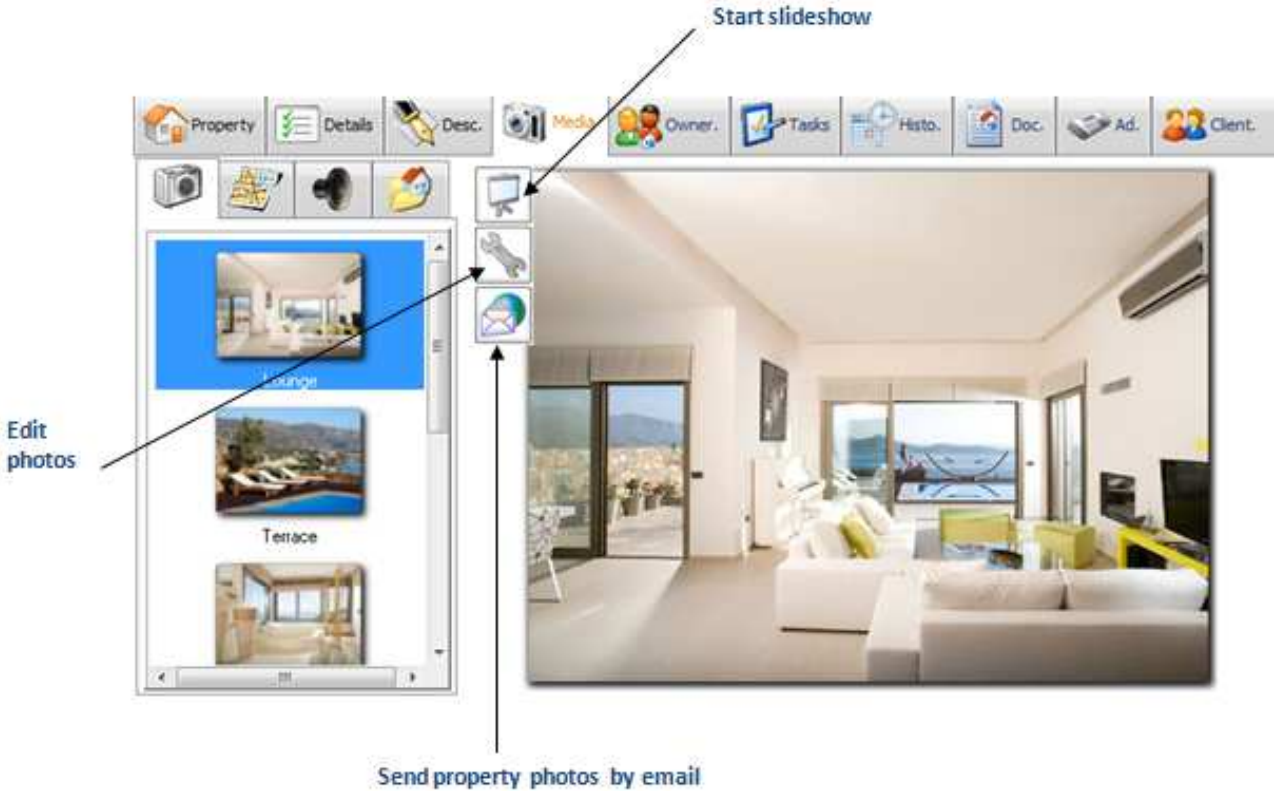
You can also edit the text layout in this window.

To add a description, select **Edit** from the **Edit menu.** The page becomes available for input/editing. When you enter the text editor, it allows you to customize your text as desired.

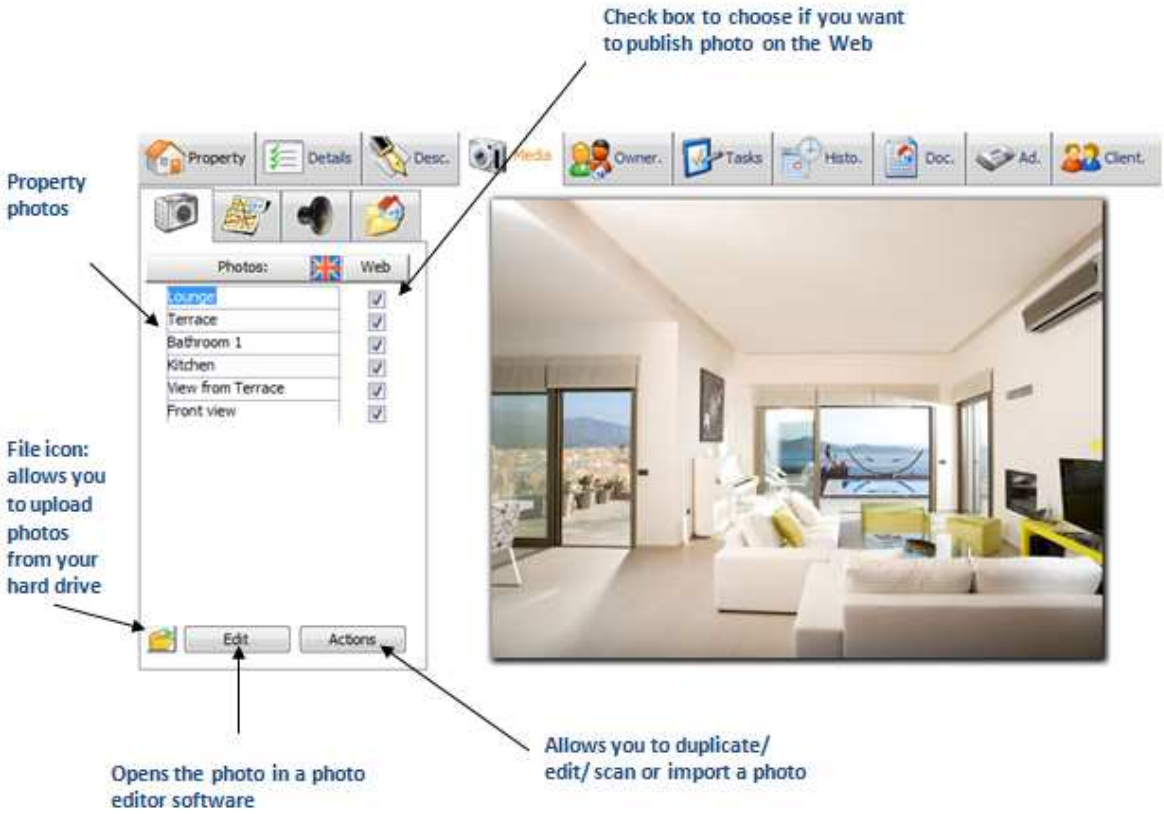
➢ **Media** Tab:

Allows you to view, include and edit photos of the ad published on Internet.

VIEW MODE



EDIT MODE



➢ **<u>To add photos</u>**, click on **«Click here to add photos».**

Add more photos by clicking on the folder icon. You can **add a photo** from your **files** (on your hard drive). You can also insert a photo directly from your **digital camera.** To do this, connect your device to your computer:

- If your camera appears directly in your browser, select your photos, as if you were to look for them in your personal file.
- If your camera does not appear in your browser, use the program supplied with your camera as usual to transfer images to your computer and then follow the procedure described in the previous example.

➢ <u>If you want to **edit** your **photos**</u>, (if they are previously entered photos, first select **Edit** from the **Edit menu** or use the keyboard shortcut **F2**). Then click the **Edit** button. The window that opens will allow you to edit the image without having to exit **Activimmo**.

<u>You can therefore</u>:

- **Enlarge / reduce** the display scale of the image.
- **Crop** the photo (you must first select the part of the photo to keep).
- **Rotate** the photo left or right.
- **Add text** on the photo.
- **Edit** text.
- **Delete** text.

❖ **<u>Note</u>**: Once you have saved the modified photo, you will not be able to edit/delete the modifications.

- Add the Agency **copyright**.
- Perform various **modifications** on the light **effects**, color, etc ... by clicking on **Settings** and **Advanced Settings** options.

The **Settings** and **Advanced settings** options trigger the opening of a window which consists of two parts that allow you

to edit or enhance your photos. The first part allows you to **view** the original photo while the second part allows you to **view the modifications** made. These windows offer access to many features that will allow you to:

- Adjust the **contrast** and **brightness**.
- Modify the **color shades** (Bump map).
- **Equalize** your colours.
- **Insert** a wave **effect** on your photos and **adjust** the effect by changing the various parameters offered.
- Insert other effects from the **Morphing filter** tab and set the morphing effect by changing the various parameters.

> ❖ **Note**: To be used only by an experienced user.

- **Rotate** your photos.

➢ The **Edit** button also allows you to import an image from a scanner, a file and the clipboard.

➢ The **Actions** button allows :

- Upload a new photo.
- Scan a new photo (source Twain).
- Scan a new image (source WIA).
- Import a photo from the clipboard.
- Reload all photos from internet.
- Send photos to your Website.
- Save picture as...
- Duplicate the photo.
- Edit the photo using an external application.
- Print photo (View mode only).

➢ **Owner** Tab :

Allows you to view and insert information about the owner of the property.

➢ This button allows sending an e-mail to the owner.

➢ This button allows you to call the (if your phone line goes through your computer, see Advanced Usage).

<u>If you check the «Archived» box</u>, the owner will no longer appear in the list of owners (however you will still be able to view his information via the **Contacts menu.** To do this, you will need to select **Owner** (**under category field)** then check the box **Archived** under **'Status'**).

<u>To **add** or **edit information**</u> about the owner, select **Edit contact** the vertical data menu (sidebar) or click **Edit** from the **Edit menu** or use the keyboard shortcut **F2.** The data sheet of the owner becomes available for modification.

➢ **<u>Tasks</u>** <u>Tab:</u>

Allows you to **create tasks** for the selected property. You can **assign** them to your colleagues (or yourself) and add a due date as well as notes.

<u>For example</u> : Window display / Order display/ Fix signpost etc..

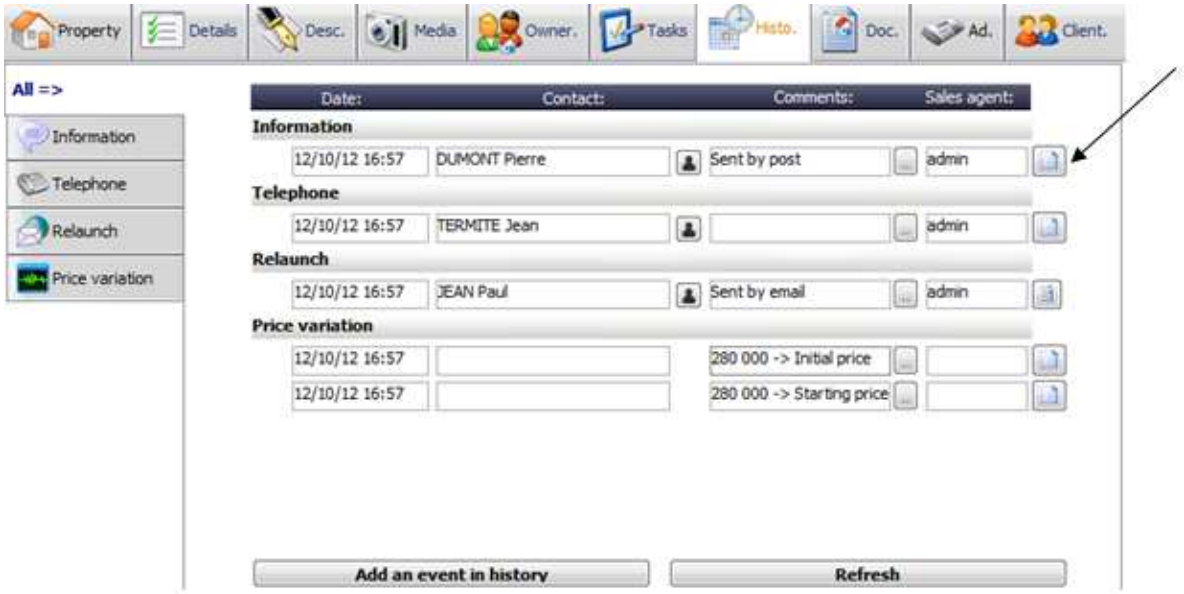
To create a task, click on the button **«Add Tasks»** at the bottom of the page**.**

➢ **Histo.** Tab (History):

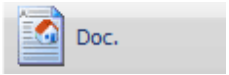
Allows you to create and track the history of events for a property. You can see the number of visits made, telephone calls received, expert reports conducted and relaunches sent.

To add events, select the name of the event and click the button **«Add an event in history»** at the bottom of the page.

Then if you want to attach a document related to the event, click on this icon (right of the screen).



To **edit an event from history**, use the keyboard shortcut **F2** or use the **Edit** command from the **Edit menu**.



➢ **Doc.** Tab (document):

Allows you to both create a new document on the selected property as well as view the history of documents previously created.

To create a document, **Activimmo** offers different operating modes: the easiest way is to click on **«Create a document for this property»** at the bottom of the page, but you can also select **«Create a document»** from the **Actions menu** (left) or via the **Tools menu** (top) or use the keyboard shortcut **F11**. Then, simply select a template from the list provided by **Activimmo**.

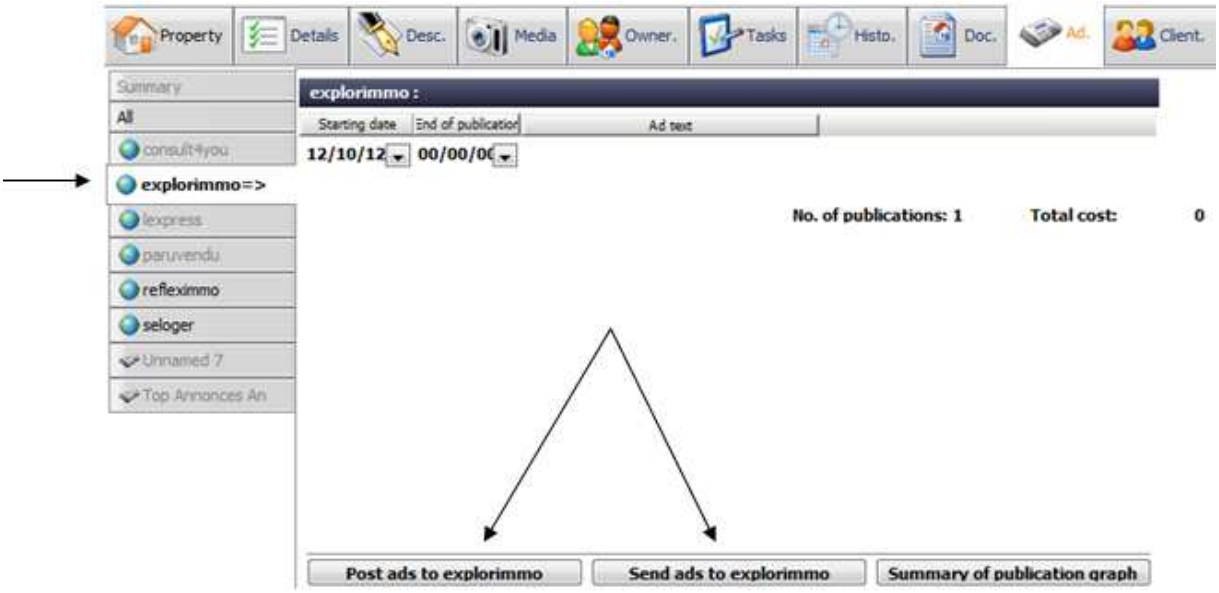
❖ **Note:** All created documents can be sent by **email** or via **MS Word.** They can also be **exported to PDF.**

➢ **Ad** Tab:

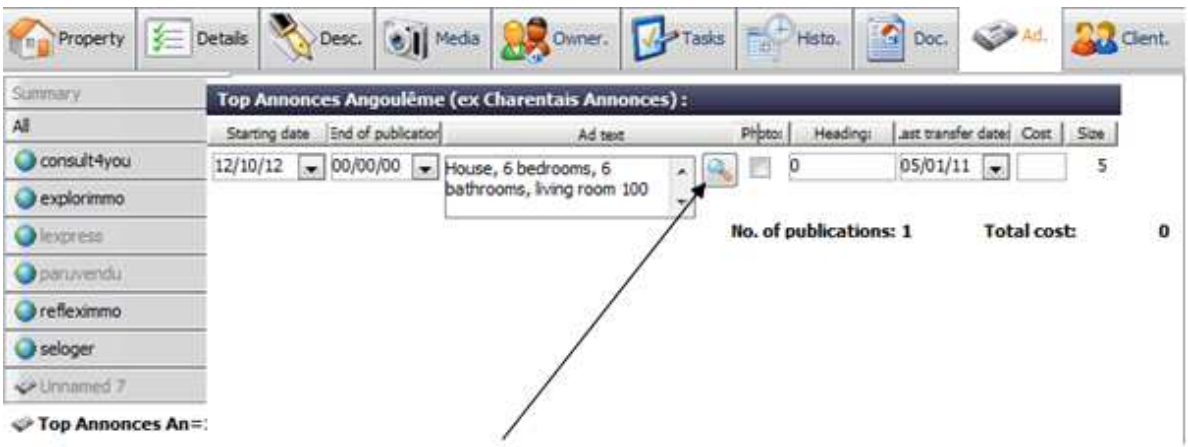
Allows you to **manage publications**.

With this tab, you can prepare and send the ads to be published by your advertisers by e-mail. You can also view the history of publications on a selected property.

For **adding ads**, select the name of the desired advertiser (on the left left) then use the buttons **«Post ads to»** and **«Send ads to»** at the bottom.



❖ **Note:** When you click the **«Post ads to»** button, the description entered for the property in the '**Desc.**' tab is automatically taken to be the text of your ad. However, you can edit the text of the ad by clicking on the **magnifying glass button** on the right.



Check the box **Photo** if you want the advertiser to publish the property photo.

<u>This is only available for paper ads</u>

This tab also allows you to **control** the number of **publications** and their total cost.

➢ **<u>Client</u>** <u>Tab (prospects) :</u>

Allows you to edit the list of clients who may be interested in the property. To generate this list, the system examines all search criteria of prospects which are not archived and confront them with the characteristics of the selected property. When criterias are met, the prospect is automatically included in the list.

❖ **<u>Note</u>**:

The list appears in the form of a table in which you will find brief information about the prospects as well as 5 options to select from: **relaunches**, **information**, **visited**, **documents** and **exclude**. These options allow you to obtain essential information at a glance and implement appropriate actions.

The buttons «**Relaunch**» at the top of the page and **«Create a document»** from the **Actions menu** allow you to print a commercial document relaunch for the property and the selected client.

The email alert button (**automatic relaunch**) in the **Tools menu** allows you to perform the same task, but this time, for all potential clients.

With this table, you can also view the selected prospect's information sheet. This can be done by double-clicking or by positioning the cursor over the client's name. The details of the client's sheet will appear in a tooltip (information bubble).

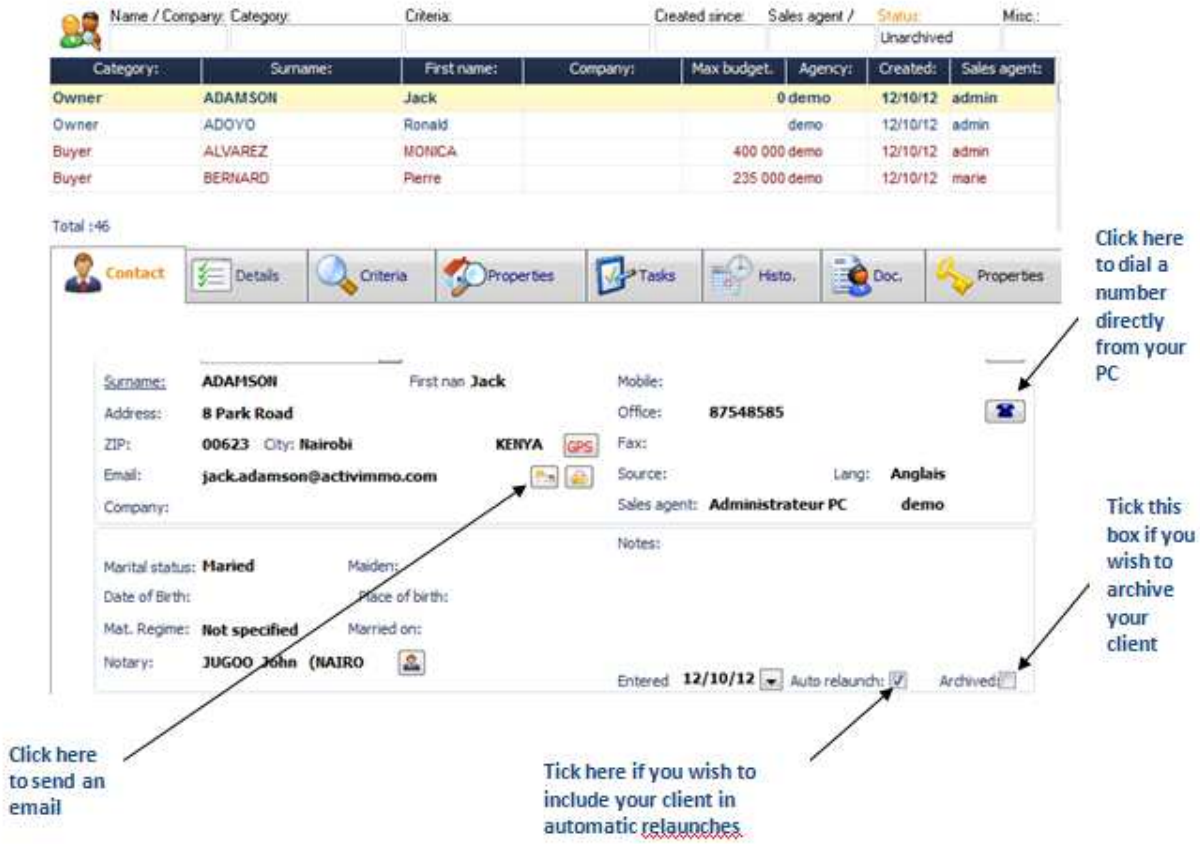
If you want to train on the creation of a property, you can go to tutorial No. 1: **Create a property**

Manage Contacts

The contacts window enables the advanced management of clients, owners and other contacts. To open the contacts window, click on **Contacts** thought the **Customize data menu**, or select **Contacts** from the vertical menu (sidebar).

This page consists of:

- A multi-criteria search box (at the top of the window).
- One box to check to view all archived contacts.
- A table listing the contacts (in the centre).
- **8 Headings (Tabs)**.



To **add new contacts**, click on **«Add contact»** from the vertical menu (sidebar) or choose **New Contact** from the **File menu.** You can also use the keyboard shortcut **Ctrl+F10**.

➢ **Contact** Tab :

Allows you to **create** and **edit** the characteristics of a contact.

- The **Auto relaunch** box (Automatic Relaunch) allows you to relaunch a contact with all properties which could be of interest to him.

- The **Archived box** means that the contact is archived, therefore, he will no longer be taken into account in search results nor in automatic relaunches for example.

- This button allows you to **call** the contact (if your phone line goes through your computer, see Advanced Usage).

- This button allows sending an **e-mail** to the contact. In addition to not having to insert the recipient's email address, this feature provides the ability to instantly archive the sent email in the history of the contact.

➢ **Details** Tab**:**

Allows you to add further information about your contact. Note that the list of available fields can be customized to suit your needs.

Such details are available : Profession/ Financial data/ Current accommodation etc.

To add new characteristics, click on **«Add details to selected contact»** (at bottom of page).

➢ **Criteria** Tab :

Allows you to create and view the search criteria of the prospect.

To edit these criteria, select **«Edit**» from the **Edit menu**, or click **«Edit Contact»** in the sidebar (vertical menu). The search criteria fields then become available for modification.

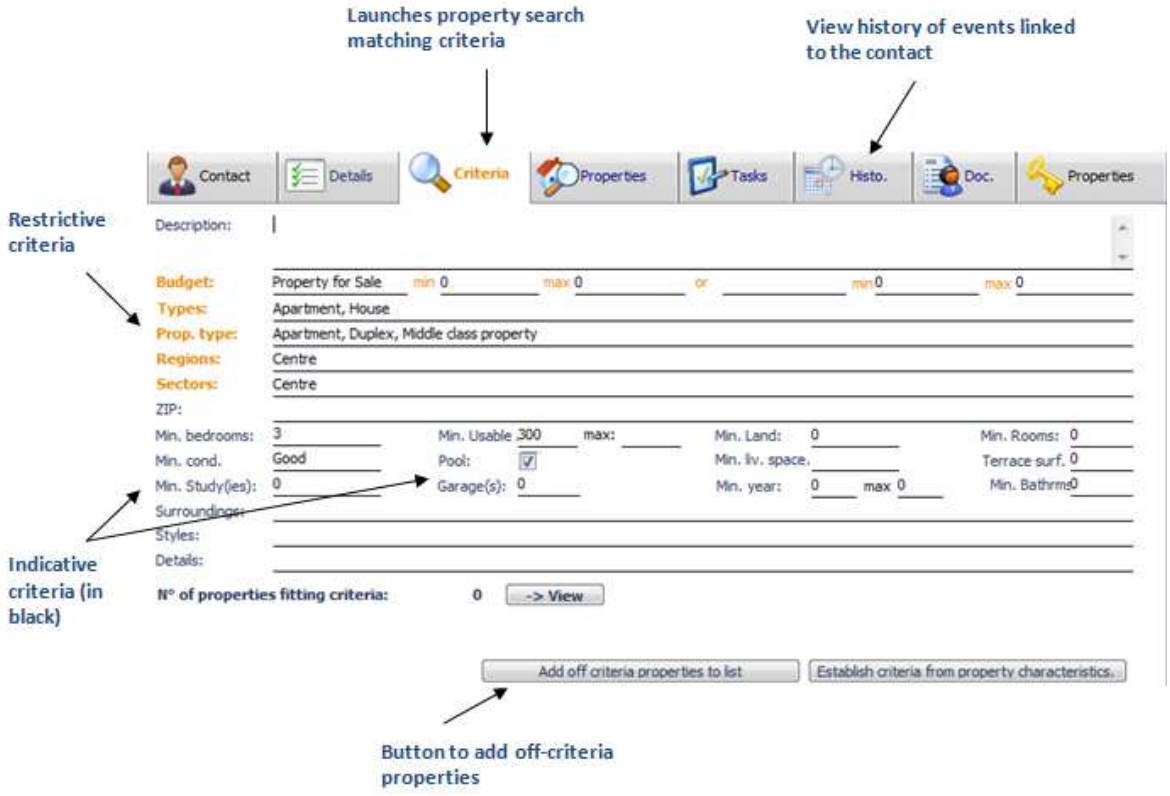
When you click on the name of a title, it turns **orange**. All the criteria that appear in orange are **restrictive criteria.** Therefore, when searching for a property using multiple criterias, the software meets all the criteria of elimination.

Note that the criterias **budget**, **types**, **property types, regions** and **sectors** are **restrictive criteria** by default (they appear in orange). You can change this status with a single click on the coloured text: if text appears in orange, they become restrictive and if they appear in **black**, they become **indicative**.

To then **view** the **list of properties** matching the search criteria of your contacts, click the on the **Property tab**.

If you want to create criteria lead customers to perform multi-criteria searches, you can follow the lesson # 2: Create the criteria customers.

If you want to train on the creation of clients' criteria in order to use the multi-criteria search, you can go to tutorial No. 2: **Create criteria for clients**



➢ **Properties** Tab:

This tab allows you to view the list of properties matching the restrictive criteria selected by the contact. The basic information relating to the property is featured as well as the percentage of criteria fulfilled in relation to the criteria of the contact. Example: If the score indicates 75, this means that ¾ of the client's criteria have been met.

Click on the property row to obtain all the information about the selected.

The print button allows you to create any document for the selected property and contact.

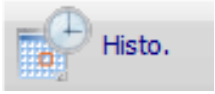
From this tab, you can print documents as well as launch the slideshow of properties matching the search criteria of your contacts.

➢ **Tasks**:

Allows you to **create tasks** for the selected contact. You can **assign** them to your colleagues (or yourself) and add a due date as well as notes.

For example : Call back / Send by email/ Deposit etc..

To create a task, click on the button **«Add Tasks for this contact»** at the bottom of the page.



➢ **Histo.** Tab (History):

It allows tracking of the history of events concerning the selected contact: visits done by a client, information provided about a property, phone calls from a property owner...

To add an event in history, click on **«Add in history» (**bottom of page).

To edit an event in the history, click on **«Edit Contact»** from the sidebar (vertical menu **Contact**) or select **Edit** from the **Edit menu** or use the keyboard shortcut **F2.**

➢ **Doc** Tab (Documents) :

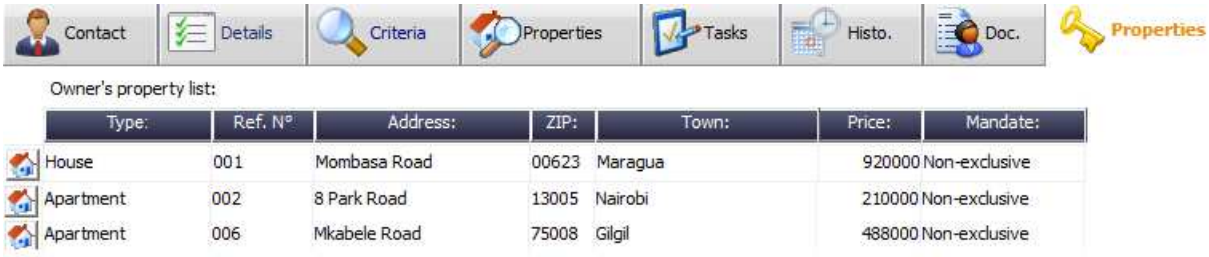
Allows you to create specific documents (ex: display, descriptive, etc) on the selected contact.

To create documents from this tab, click on **«Create a document for this contact»** ,at the bottom of the page, then select the document template desired and choose the property to be included in the document.

➢ **Properties** Tab:

It shows you a list of different properties belonging to a contact.

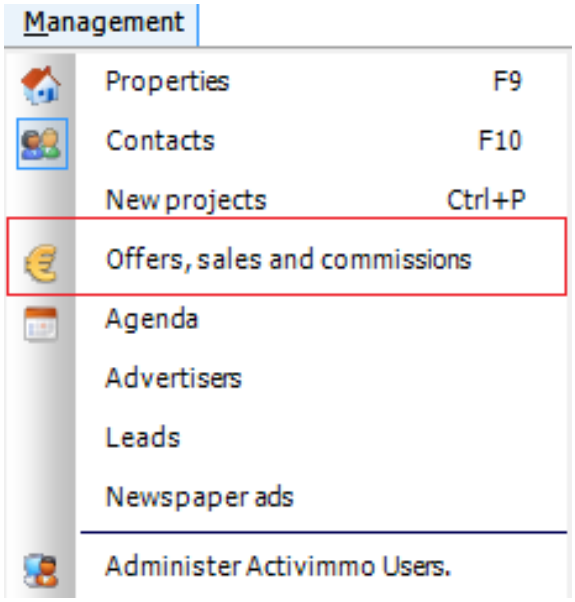
For example: Mr BOND owns 3 properties. You will therefore see his 3 properties listed in this tab.



Manage Offers and Sales

This window allows you to manage **offers, sales and commissions** in general (**Sale** or **Rental**).

To open the offers window, click on **Offers** on the left vertical menu (sidebar) or select **Offers, sales and commissions** from the **Management menu**, or click on the icon in the **toolbar**.

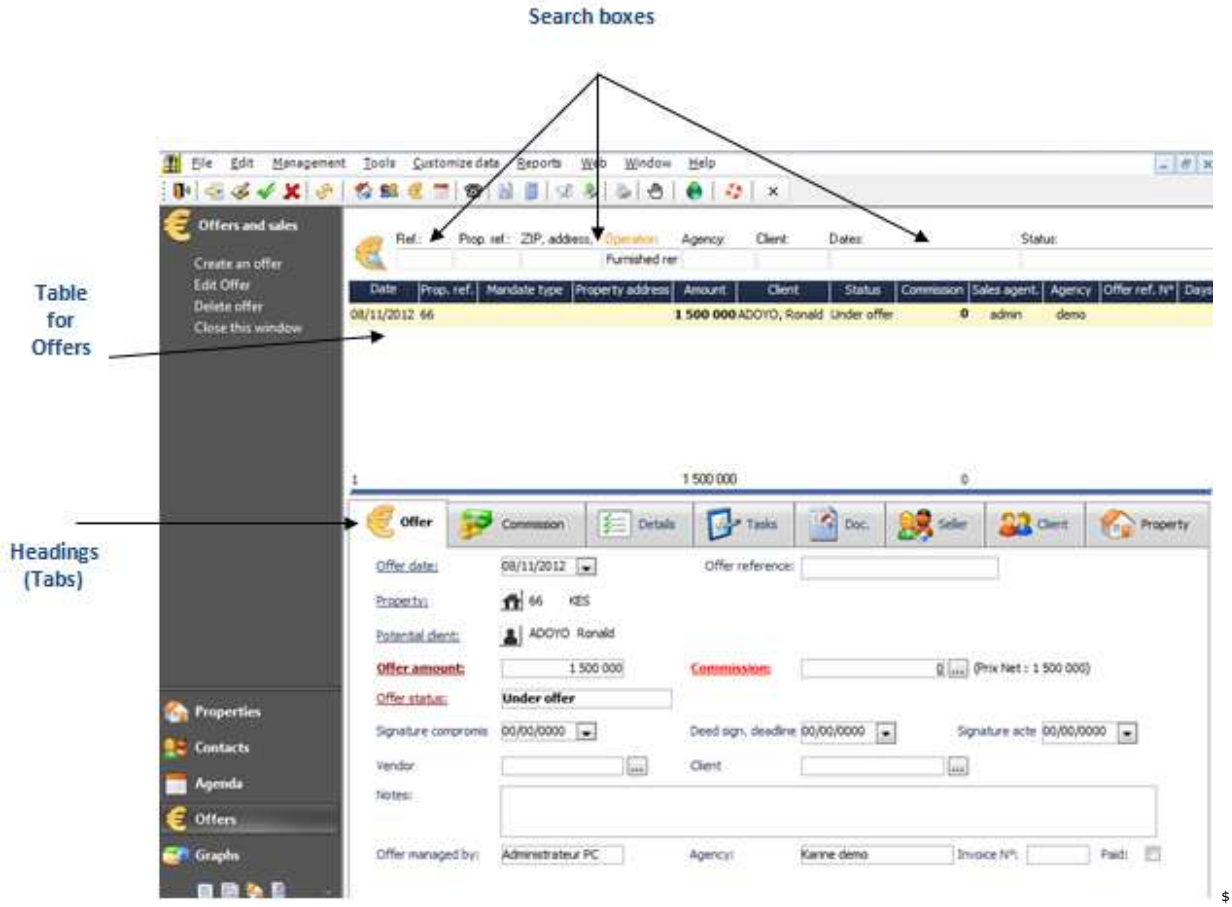


This page consists of:

1. A table for the offers (in the center)
2. **Search boxes** at the top of the window. (Reference / Address / Operation / Agency / Statuts / etc.)

❖ **Note that these criterias can be combined according to your offers.**

3. 8 headings (Tabs: **Offer, Commission, Details, Tasks, Documents (Doc.), Seller, Client** and **Property**).



To add new Offers, click on **«Create an offer»** or select **«Insert new data»** from the **Edit menu.**

<u>You will then need to</u> :

- Select a property and
- Select a contact
- Insert data in each tab.

Offer

➢ **<u>Offer</u>** <u>Tab:</u>

Allows you to **create** and **edit** the characteristics of an offer made on a property.

You can:

- See the property sheet
- See the contact sheet (buyer)
- Insert the offer amount
- Insert the commission rate
- Insert the offer status (under offer / accepted / etc.)
- Insert the notary details for both parties
- Write notes, etc.

➢ **Commission** Tab

Here you have the possibility to divide the commission between the different actors of the transaction.

To do so, you need to:

- Click on the button '**Add commission**' (bottom of page).
- Click on the black arrow under **'Sales contributor**' and select the sales agent(s) involved in the transaction from the dropdown menu.
- Click on the black arrow under **'Role of the contributor**' and select the amount of commission that should go to the contributor from the dropdown menu.

❖ **Note** : The amount will be calculated and will be displayed automatically under the column '**Amount**'.

- Once you have added all the contributors, click on the button '**Recalculate commissions**'.
- You can also see the distribution of commissions on a graph if you check the box: **View Graph**

➢ **Details** Tab **:**

Allows you to add useful information in the offer. Note that the list of fields available can be customized to suit your needs.

Such details are available : Sale/ Rental/ Loan amount/ Lease start date etc.

To add new information, click on **«Add data on selected offer»** (at bottom of page).

➢ **Tasks** Tab:

Allows you to **create tasks** for the selected offer. You can **assign** them to your colleagues (or yourself) and add a due date as well as notes.

For example : Write lease agreement / Send lease agreement/ etc..

To create a task, click on the button **«Add Tasks»** at the bottom of the page**.**

➢ **Doc.** Tab (Documents) :

Allows you to create specific documents (ex: client visit sheet, etc.) concerning an offer on a property.

To create documents from this tab, click on **«Create a document for this property»**, at the bottom of the page, then select the document template desired.

➢ **Seller** Tab:

Allows you to **view**, **create** and **edit** the characteristics of the property's owner(s).

- The **Auto relaunch** box (Automatic Relaunch) allows you to relaunch a contact (owner) automatically or in groups.

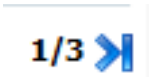
- The **Archived box** means that the contact (owner) is archived; therefore, he will no longer be taken into account in search results nor in automatic relaunches for example.

- This button allows you to **call** the contact (owner) (if your phone line goes through your computer, see Advanced Usage).

- This button allows sending an **e-mail** to the contact. In addition to not having to insert the recipient's email address, this feature provides the ability to instantly archive the sent email in the history of the contact.

To add an owner, click on the button **«Add Owner»**

❖ **Note**: A property can have multiple owners. (For example: Mr and Mrs Bond)



If there are multiple owners, you can see the data of each of them by clicking on the blue arrow (bottom right of the screen). In this example, we see that there are 3 owners for this property.

➢ **Client** Tab:

Allows you to **view** and **edit** the characteristics of the owner(s) of the property.

- The **Auto relaunch** box (Automatic Relaunch) allows you to relaunch a contact automatically or in groups.

- The **Archived box** means that the contact is archived; therefore, he will no longer be taken into account in search results nor in automatic relaunches for example.

- This button allows you to **call** the contact (if your phone line goes through your computer, see Advanced Usage).

- This button allows sending an **e-mail** to the contact. In addition to not having to insert the recipient's email address, this feature provides the ability to instantly archive the sent email in the history of the contact.

➢ **Property** Tab**:**

This tab allows you to view the property matching to the selected offer. There is basic information relating to the property.

Example: Property type/ Number of bedrooms / Usable surface area / etc.

You can view the property photos by clicking on the photo at the bottom right of the page.

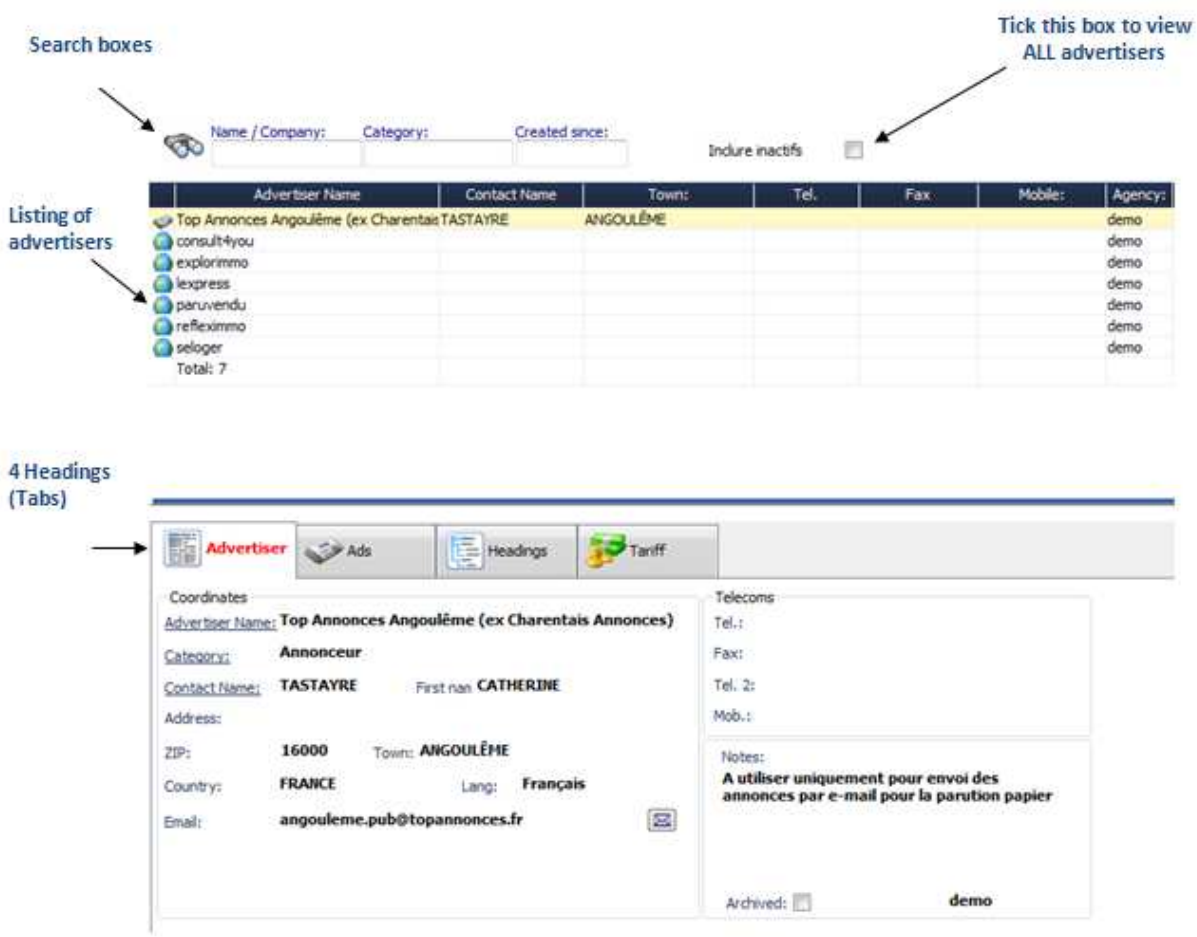
Manage Ads

This page allows a direct, real ad tracking with advertisers. It takes into account the publications caldendar of each advertiser. It publishes a specific ad for each property based on the short description filled in the tab **Desc**. of the property window.

To open the advertisers window, click on **Advertisers** in the **Management menu**.

This page consists of :

1. **Search boxes** at the top of the window.
2. One **box to check** to **view** all the **advertisers** (including the unavailable ones).
3. A **table** in the center **listing** the various **advertisers**.
4. **4 headings** (tabs): Advertiser, Ads, Headings and Tariff. $



To add new advertisers, select **«New Advertiser»** from the **File menu** or select **«Advertiser»** from the **Management menu**, right click and select **«Create»**.

You can also use the keyboard shortcut **F5** (to do this. you must be in the **Advertisers window**, in the **Advertiser tab** or on the advertisers listing).

➢ **Advertiser** Tab:

Used to describe an advertiser, the name of the publication (newspaper, magazine ...), the name of the contact at the advertiser, the phone number, email address...

- This button allows you to **call** the advertiser (if your phone line goes through your computer, see Advanced Usage).

- This button allows you to send an **e-mail** to the advertiser.

➢ **Ads** Tab :

This tab allows you to view the history of the Ads published with each advertiser. You can also find out the cost, the number of publications and the size of your ads.

You can view the entire text of the ads previously published by clicking on the gray button with 3 dots which is found at the end of the Ad text (on the right).

➢ **Headings** Tab :

Allows you to **view**, **create** (using the button **«Add Newspaper heading»**) or **delete the different headings** of the advertiser (via **«Edit»** from the **Edit menu**).

These headings will be useful when creating ads, you will find them under the **tab Ad** of the property window.

➢ **Tariff** Tab :

This tab allows you to set the price range by the number of characters matching an advertiser.

Ads cost	Maximum number of characters
15,0000	200
30,0000	500
45,0000	1000

Example: Up to 200 characters, the price is equal to 15€. From 201 to 500 characters, the price is 30€. Finally, the price will be equal to 45€ from 501 to 1000 characters.

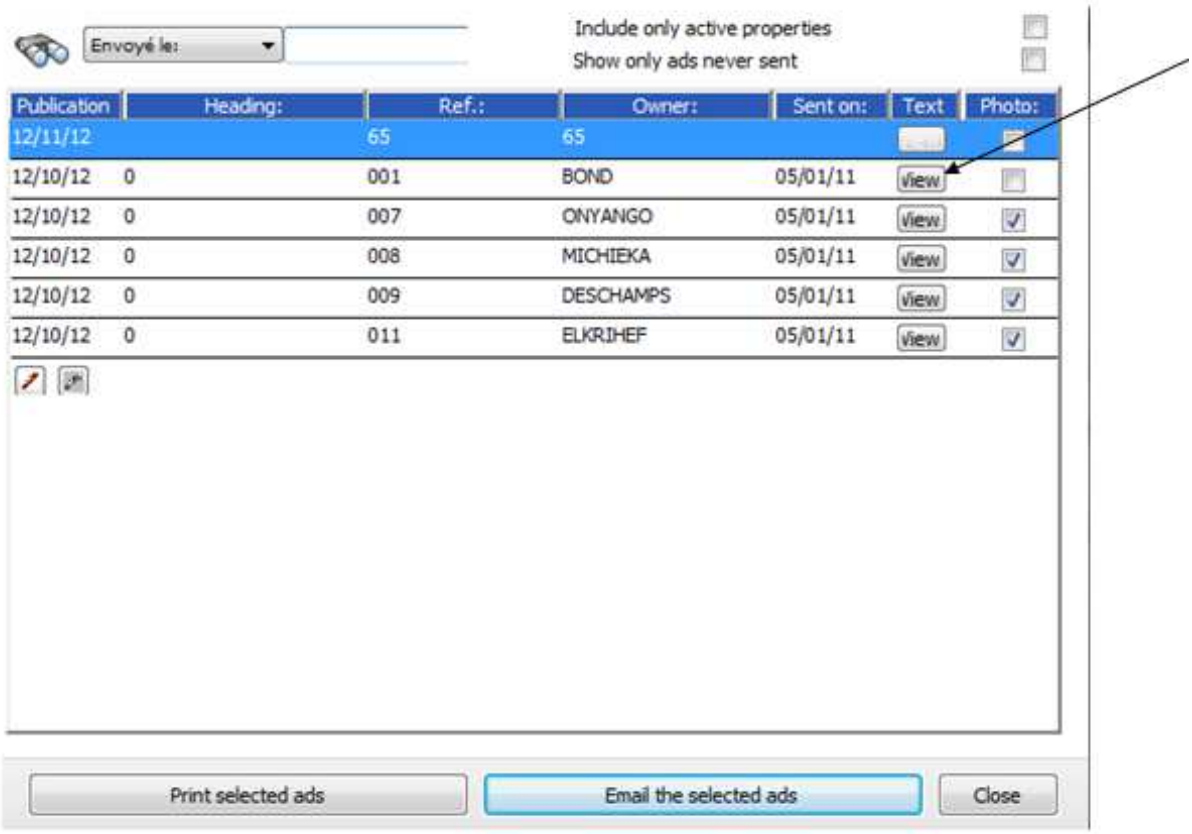
This information will be useful when you create ads as you can immediately know their prices.

Publishing paper Ads

With **Activimmo**, you can send the text of a paper ad (or several) to an advertiser (partner) by e-mail.

You can use the **Management menu** to **publish your ads:** click on «**Newspaper ads»** and then select the **desired advertiser**. Then, select the **date of publication** of your ad using the calendar that appears on the screen. **Select the properties** to be published, validate the ad text and then select the desired option for sending (For example: send the ads **by e-mail**, **print** ads on paper or **view all ads** from this advertiser).

Note: You can preview the ad before sending it by e-mail if you choose: **View all ads from this advertiser** and click on the **View** button in the pop up that appears on the screen. $



The Documents

Activimmo allows you, from the data completed in the different management windows, to create numerous types of documents: **relaunches, displays, sales agreement** or even **listings** and **activity reports** for your properties... They can be sent by **e-mail** or **printed** instantly.

1) The documents : letters, sales agreement...

These are relatively short and useful documents in the relation between the agency and the contacts.

You can access these documents in the **Documents** tab (**Doc.**) from the management windows (in this case the document is related to the selected object, property or contact).

You can also access documents that were created in the **'History'** Tab (**Histo.**) from the management windows.

To create a new document, click **Create a document** from the **Actions menu** in the vertical menu (sidebar) in the property and contacts management window. You can also click on the icon in the toolbar.

When creating a document, windows appear and prompt you to choose the document template to be used and then, depending on the template, you will be required to provide additional information (property (ies) as well as contact(s) in relation to the document). The creation is then automatic: the system replaces the entry points using the property (ies) data, client(s)... Your document is then ready and can be editted if you wish.

❖ **Note :** By clicking on this button you can export your documents to **Word**. You will then only need to use the **Save As** command to save the document in your chosen location.

[It is also possible to create or edit document templates, using the **Customize data menu** (see section concerning word processing in **Activimmo**)]

❖ **IMPORTANT:** Automatic creation of a document is made from the «**Document**» tab in the various windows or by selecting **Create a document** from the **Tools** and **Actions** menus.

2) The reports: Listings, activity reports, planning

These are longer documents and are used to **manage the agency and employees**, they can not be sent by e-mail.

To **edit** property listings, mandates or contacts, appointment schedule. **Click on the Reports menu** and select the report you wish to use so that it will appear on the screen.

You can also **edit the classification of data** by clicking on '**sort by'** and choosing from the drop down menu or by **selecting** a specific report from the **horizontal Reports menu** (Contact List/ List of properties, etc).

At the bottom of the window, there are 2 navigation buttons that allow you to move from one page to another and a button that allows you to print directly..

If you want to **edit the date range of the listing** on your screen, click on the arrow in the range box (**Property entered**..) and select from the drop down menu.

Activimmo Tools

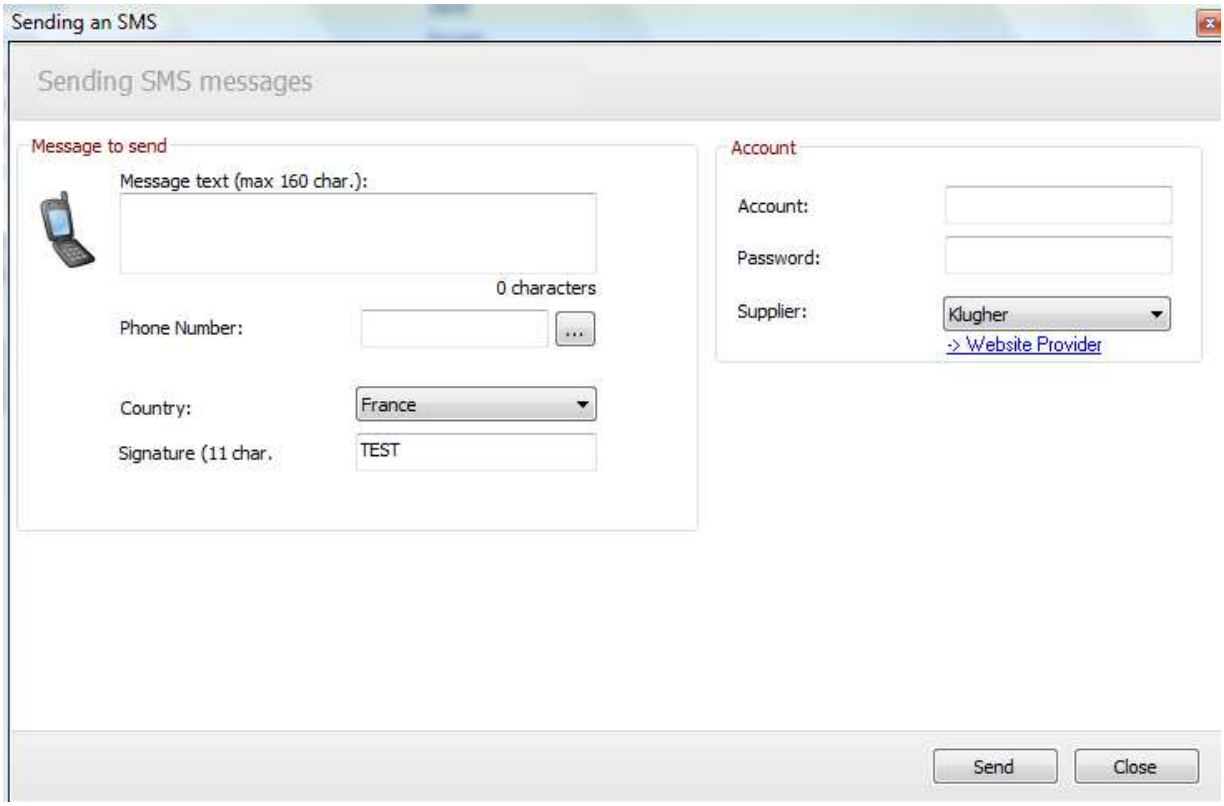
Activimmo allows you to access and use effective tools :

1. Sending **SMS**
2. **Agenda**
3. **Loan calculator**
4. **Surface area convertor**
5. **Search by phone number**
6. **Slideshow**

➢ **Sending SMS**:

You can send **SMS** from **Activimmo** when you are in the Owner tab in the property window, the contact tab in the contacts window, in the Agenda or at any time from the **Tools menu** in the toolbar. To do this, you will need to contact us so that we can provide a messages package.

When you select this option, the following window appears on the screen:



<u>This window is divided in 2 sections</u>:

<u>The first section</u> allows you to dial the number and select the destination country.

By checking the box **Delay sending on**, you can choose the exact time and date for sending your message. You must then enter your account number and password to be able to write and send your **SMS**. To obtain an account and credit, **you must contact our customer service team.**

Your message will be sent via Internet by clicking on the **Send** button.

<u>The second section</u> allows you to monitor the message delivery by displaying its status and its reference. You will also be able to view the number of messages or credits remaining on your account.

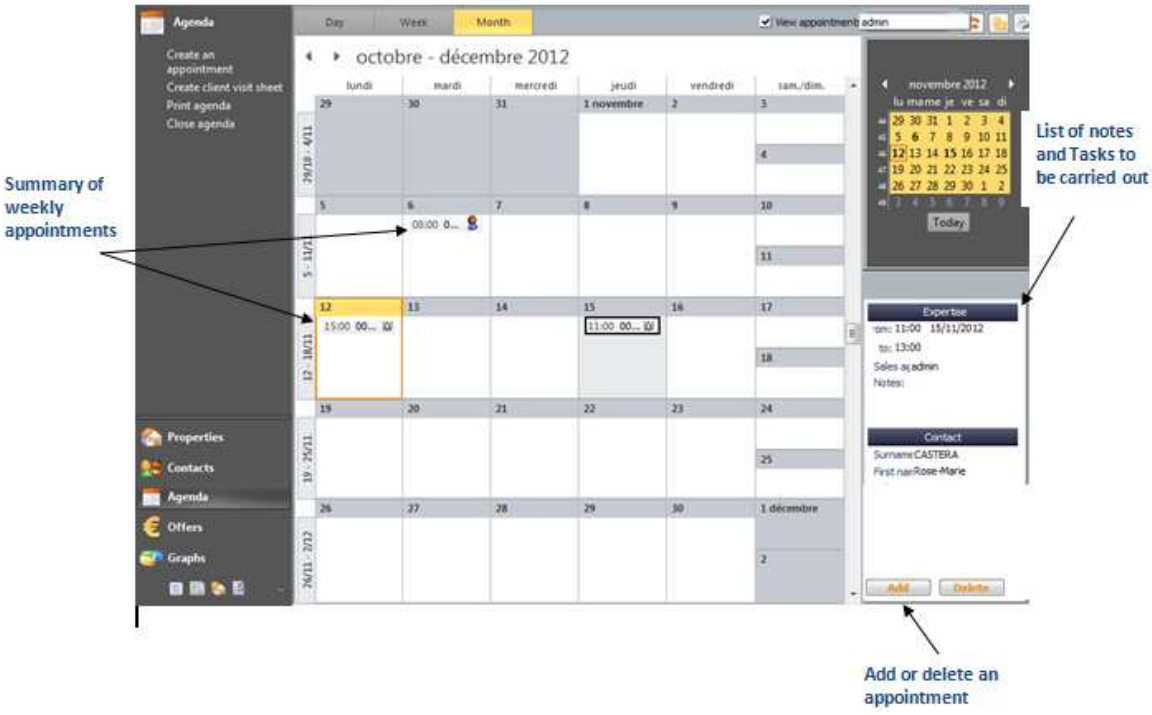
➢ **<u>Agenda</u>**:

Allows you to manage the appointments of all employees, and schedule appointments between users and contacts.

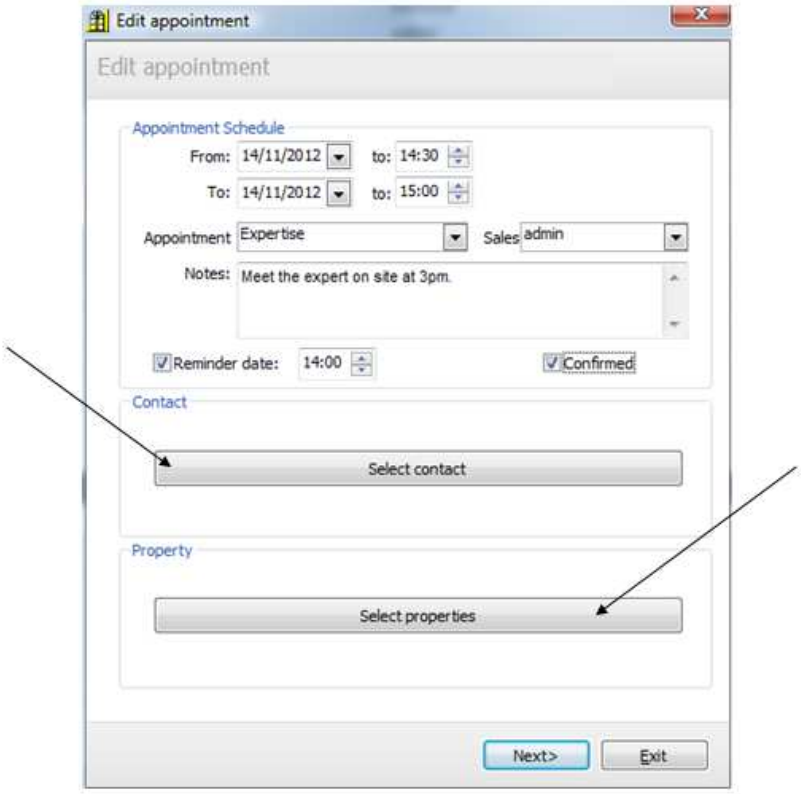
It also contains an area to write notes or memos.

When opening the Agenda, in the right side, you can **add** or **delete notes or tasks** to be carried out. When you complete them, you can check the box at the beginning of the line: it will put a line through your notes (to cross it out).

The left side of the page is for **appointments.**

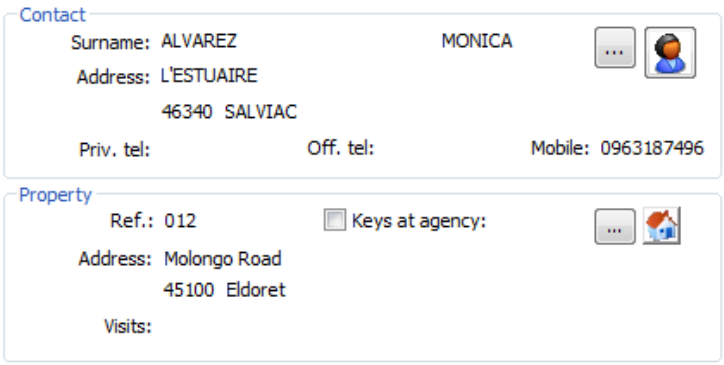


- **To create an appointment**, select the **date** using the calendar and click on the appropriate **time slot** in the table in the center of the screen. Then click on **«Create an appointment»** from the vertical menu (sidebar) or right click with the mouse and choose **«Create an appointment»**.
Fill in the details in the window that opens on the screen:



- **Select contact** – Click on this button to open the contacts window and select the desired contact.
- **Select properties** – Click on this button to open the properties window and select the desired property.

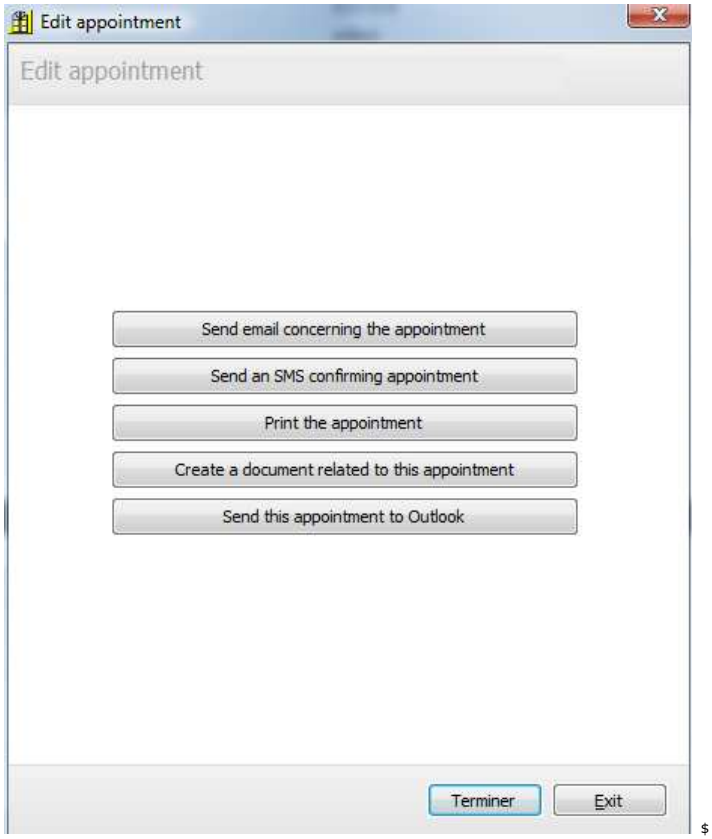
Once you have selected a contact and a property (or more), the information will appear as follows:



- When you finish your selection, click on **'Next'**.

The window that follows offers you **5 optional features**:

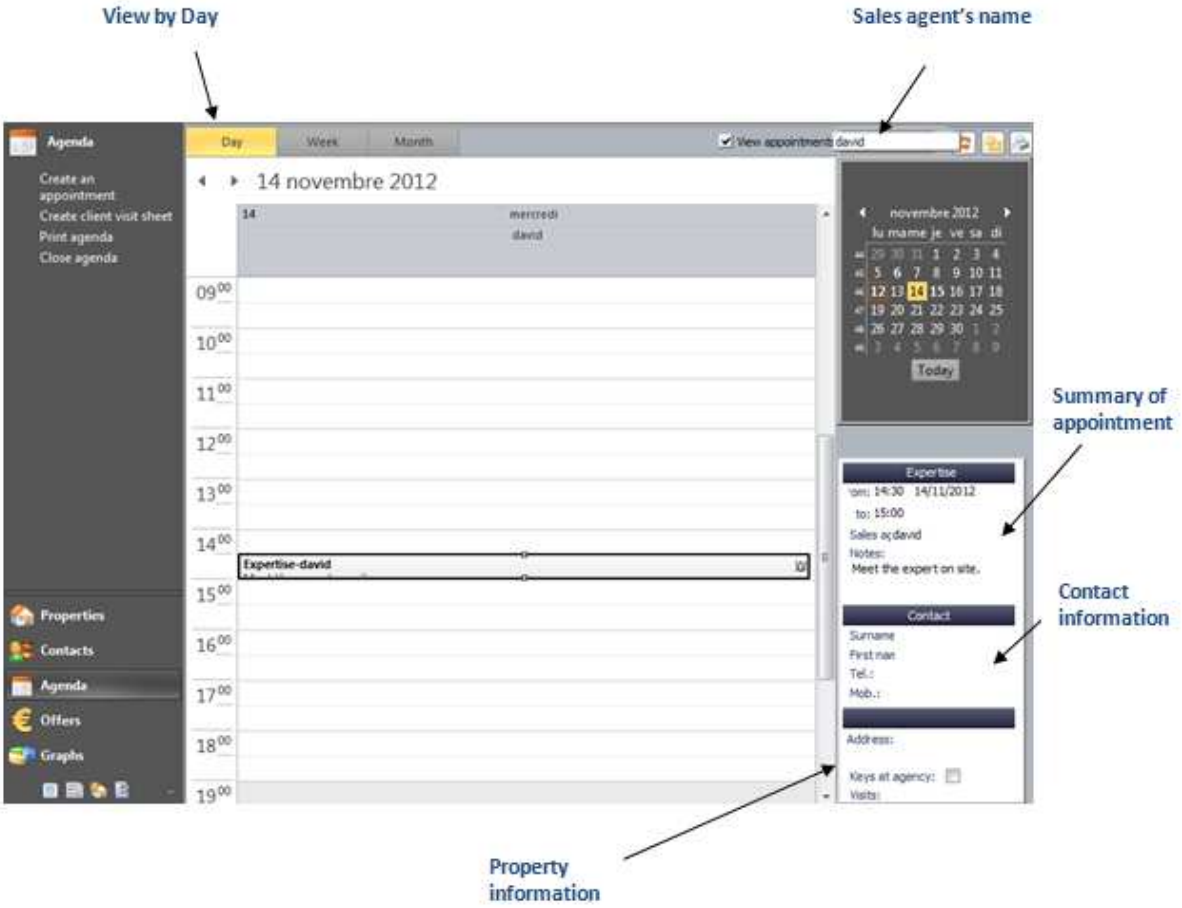
1. **Send email** concerning the appointment
2. **Send an SMS** confirming appointment
3. **Print** the appointment
4. **Create a document** related to this appointment
5. **Export** this appointment **to Outlook**



❖ **Note :** when **Activimmo** is launched, it will remind you the appointment(s) by sending you a message before the scheduled appointment.

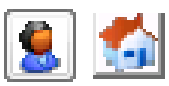
- To **add a new type of appointment** in the agenda (for example, a telephone appointment or a video conference), go the **Customize data menu**, select **«Properties»** then **«Events»,** click on the button **«Add new event»**, fill in the appropriate fields and then check the box **«Show in agenda»**.

When you select a date on the calendar, you can **open the agenda on that specific week** or on the **selected date** (**View by day**). You can then refine your search criteria by selecting the name of the sales agent(s) involved.



The agenda opens automatically on the current week. If you select an appointment, the details will appear on the right.

- Double click on the appointment to view information concerning the appointment.



- A simple click on these 2 buttons allows you to **view** all **informations** concerning the **contact** and the **property.**

- This button allows you to **edit** the **property** and the **contact** for your appointment. If you wish to **edit** the **name of**

the sales agent, you must **double click** on the appointment in the agenda.

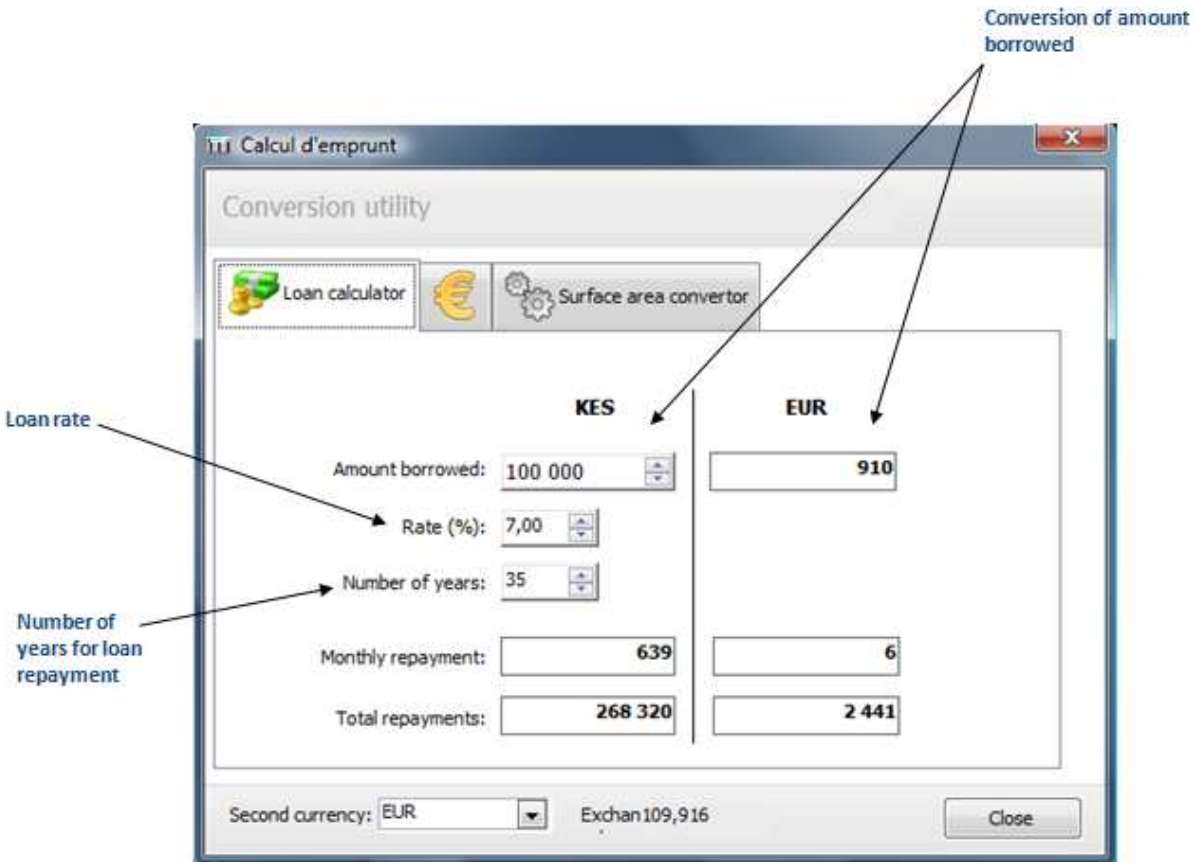
- To **edit** the appointment **date**, the **property** or the **contact** linked to the appointment, you can also click on the appointment (single click). You can then edit the details (shown on the right) **or** you can double-click on the appointment and complete the empty fields in the window that appears on the screen.

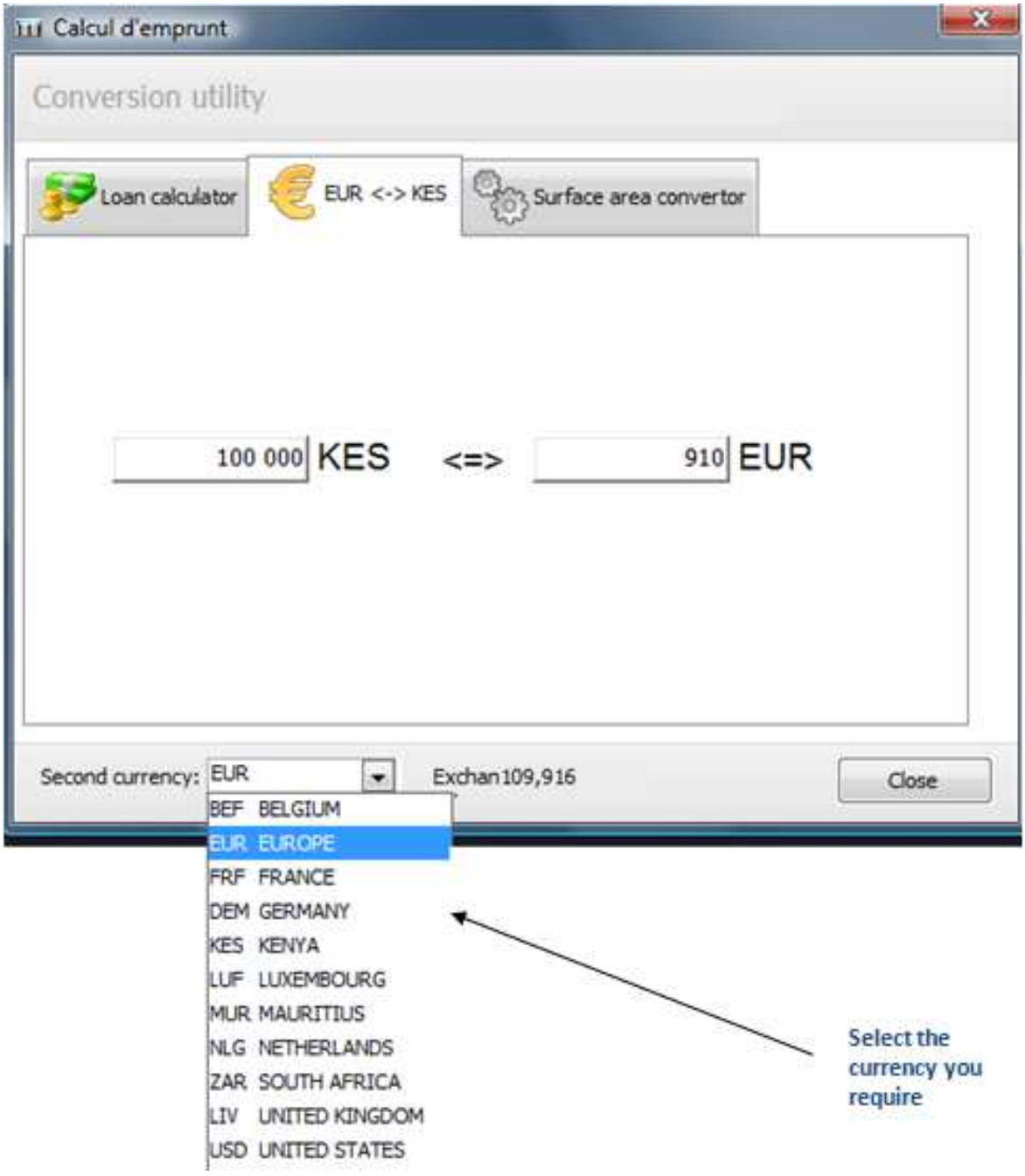
❖ **IMPORTANT:** Remember that appointments or notes correspond to one day, you must therefore select that specific day to view the appointments for that day.

➢ Loan Calculator

This calculator (**Loan Calculator** in the **Tools menu**), enables you to calculate loans (monthly, total cost ...). It also converts the «local currency» to a foreign currency or vice versa.

You can choose from the dropdown menu, at the top right of the screen, the currency which you want to use. $

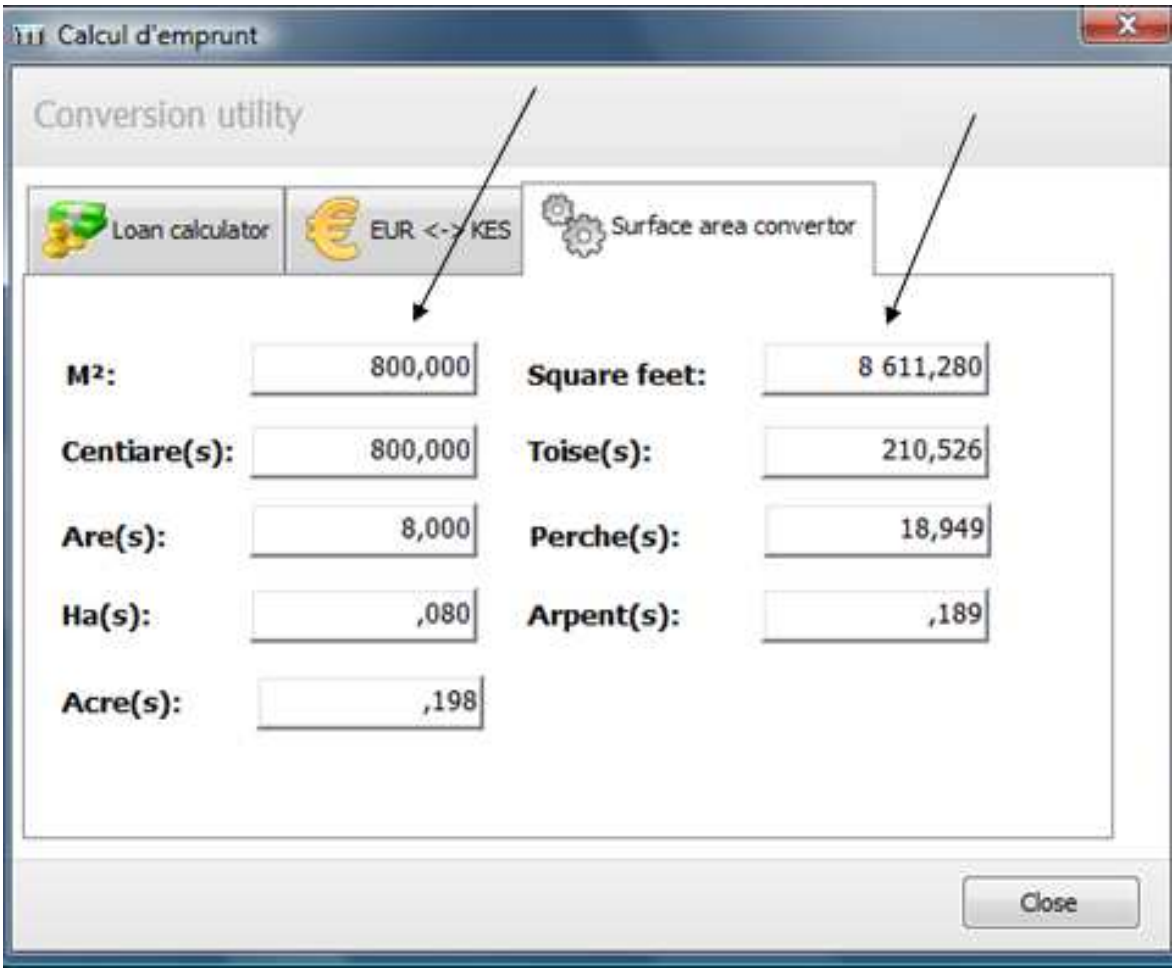



Calcul d'emprunt
Conversion utility
Loan calculator
EUR <-> KES
Surface area convertor
100 000 KES
<=>
910 EUR
Second currency: EUR
Exchan109,916
Close
BEF BELGIUM
EUR EUROPE
FRF FRANCE
DEM GERMANY
KES KENYA
LUF LUXEMBOURG
MUR MAURITIUS
NLG NETHERLANDS
ZAR SOUTH AFRICA
LIV UNITED KINGDOM
USD UNITED STATES
Select the currency you require

Surface area convertor :

This tool allows you to convert surface areas between various measures. For example, a plot of land of 800 square meters is equal to 8611.280 square feet / 18,949 perches etc.

When you complete a field with a measurement, the conversion in the other fields is automatically displayed. $



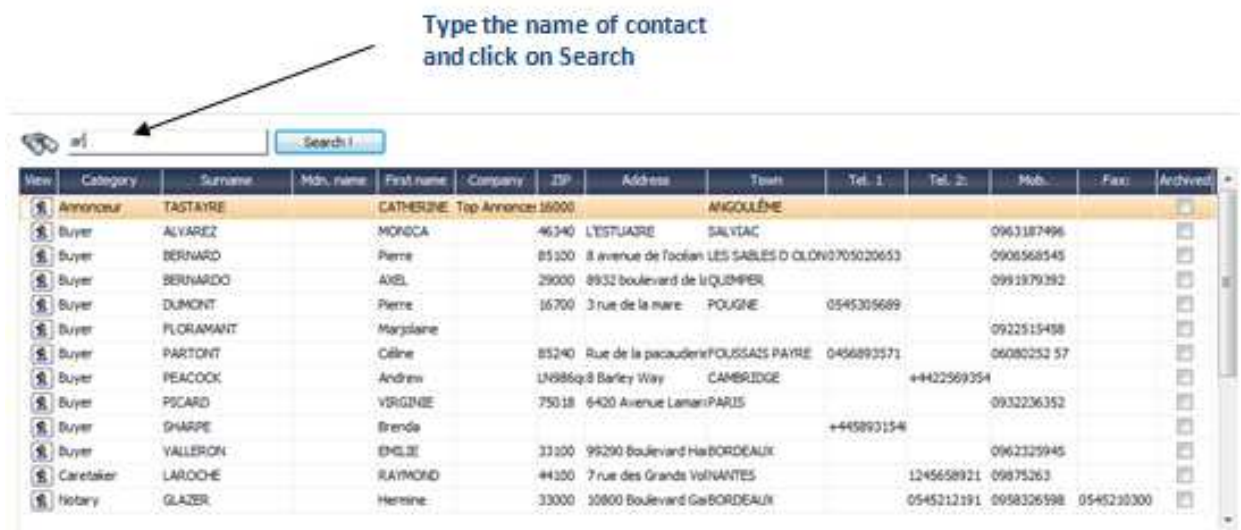
➢ **Search by phone number**:

This tool allows you to **search a contact using his phone number or his name**.

When you **type** the **name** or **full phone number**, you get all the main characteristics of your contact.

However, you can also enter only the beginning of a number, then the search will give you a list of people who have a number starting with the one you entered. By **double-clicking** on a **person's name** from the list, **Activimmo** immediately gives you all the **relevant information**.

If you type the beginning of a name in the search box, **Activimmo** will do a search based on names, surnames, e-mail address.

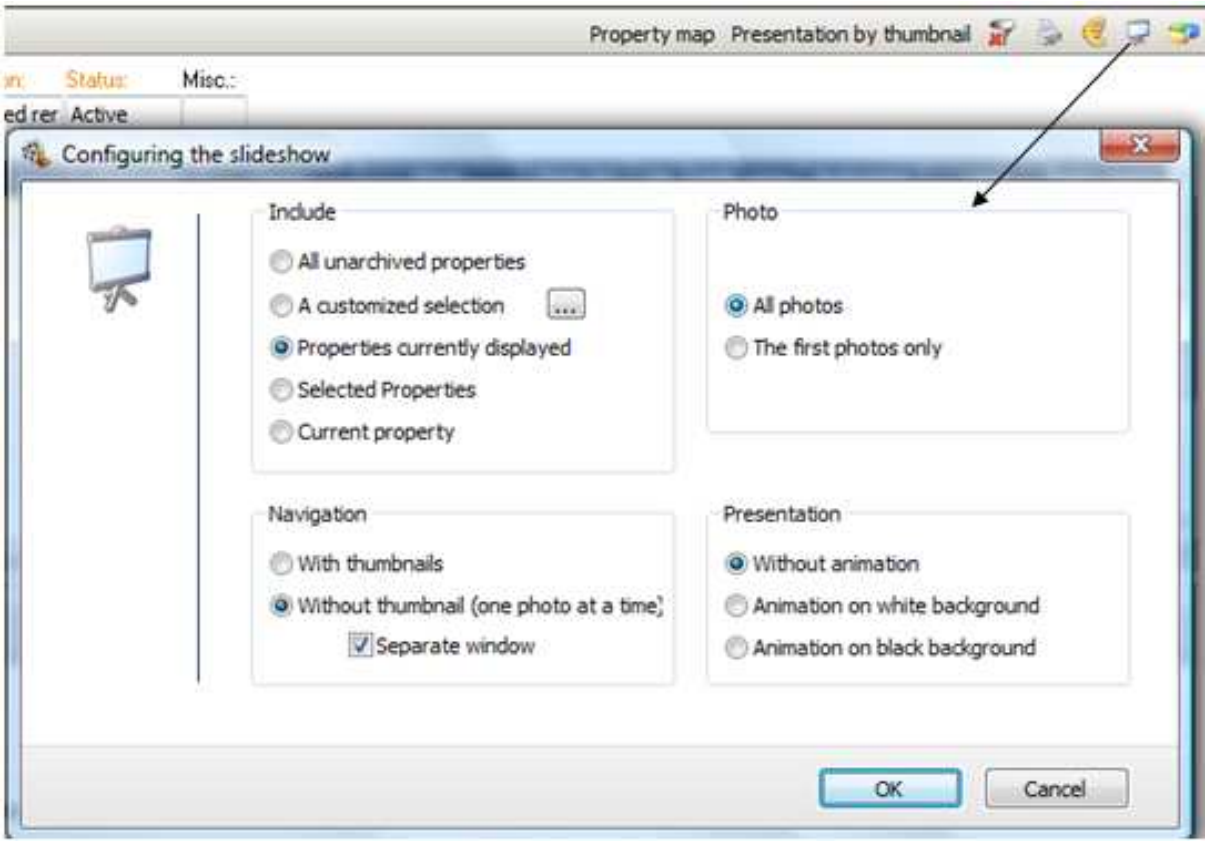


➢ **Slideshow**:

Activimmo allows you to view all the photos of available properties (in the property list) in a slideshow. You can also customize your slideshow based on the properties matching the search criteria of your clients.

You can access this tool by selecting **Properties** from the **Management menu**, then under the **Actions** menu, on the vertical bar (sidebar), choose **«View Slideshow».** Or on the top right hand side of the window, click the **slideshow icon**, then choose an option from the following: **with the current property, with the current properties, with the selection of properties** or **slideshow with options**.

When selecting **Slideshow with options,** the following window opens :



The slide is controlled from the keyboard. You can then:

1- **Scroll through the photos** one by one using the left and right arrows or the **+** and **-** keys on the numeric keypad.

❖ **Note**: If you have selected several properties for the slideshow, by using the arrows left and right, you will automatically jump from one property to another. The reference number of the property will be displayed on each photo.

2- **Exit** the slideshow by pressing on the **ESC (escape) button**.

3- **Scroll or stop the slideshow automatically** with the keyboard key **5** on the numeric keypad.

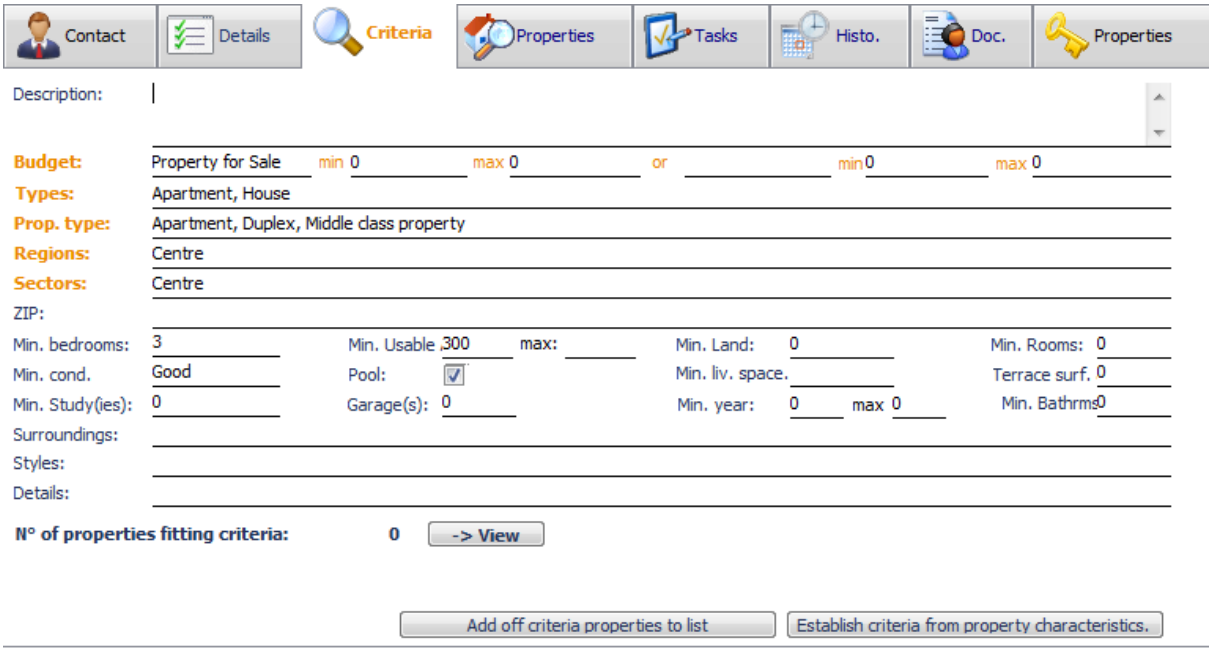
Advanced Search

Multi-criteria Search

Activimmo has an advanced search tool that allows you to instantly filter information that is of interest you. In a multi-criteria search, the system reconciles the relevant properties in your database to the search criteria of your prospects.

This function can be accessed via the main menu **Properties** - **Actions** – **Advanced Search** (or by clicking on the **house/magnifying glass icon** in the **filter bar (search box)** or from the **Contacts menu**, the **Criteria tab** (you will then need to fill in the fields matching your search, and then click on the **Property tab** to view the list of properties matching your search).

Contact –Criteria Tab: The search criteria window opens, simply fill in the appropriate fields. In fact, the window is divided into different headings (Tabs) such as **budget**, **types**, **property type**, **sectors**, **number of bedrooms, minimum condition required, garage , land surface area, swimming pool, surroundings**, etc...



❖ **Note**:

Criteria that appear in orange are restrictive criteria, while those that appear in black are indicative criteria.

To render a criteria restrictive, simply click on its name and it changes its colour to orange; if you click on the name of a criteria which has orange letters, it will then turn into black and becomes indicative.

Note that the criteria: **budget, types, prop. Type, regions** and **sectors** are **restrictive criteria by default.** It is up to you to change them (in a single on their name) except for **budget which will always remains a restrictive criteria.**

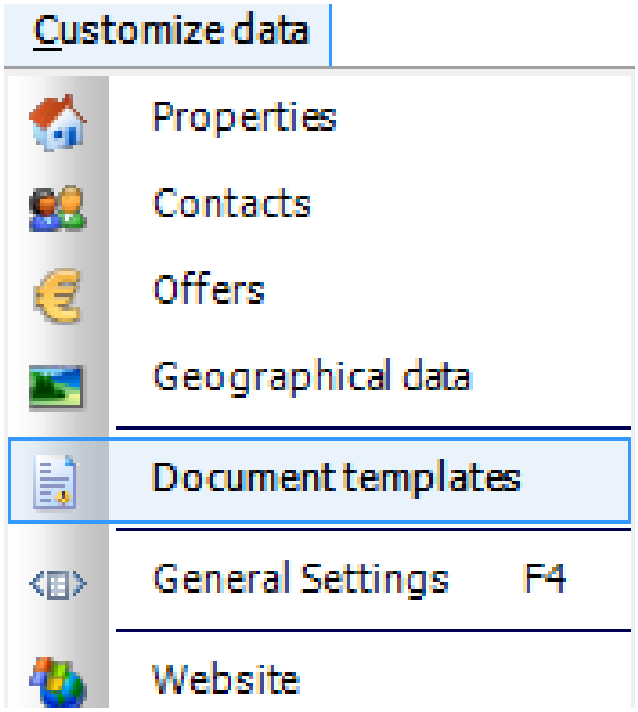
Properties resulting from an advanced search fully comply with the criteria entered.

Manage documents templates

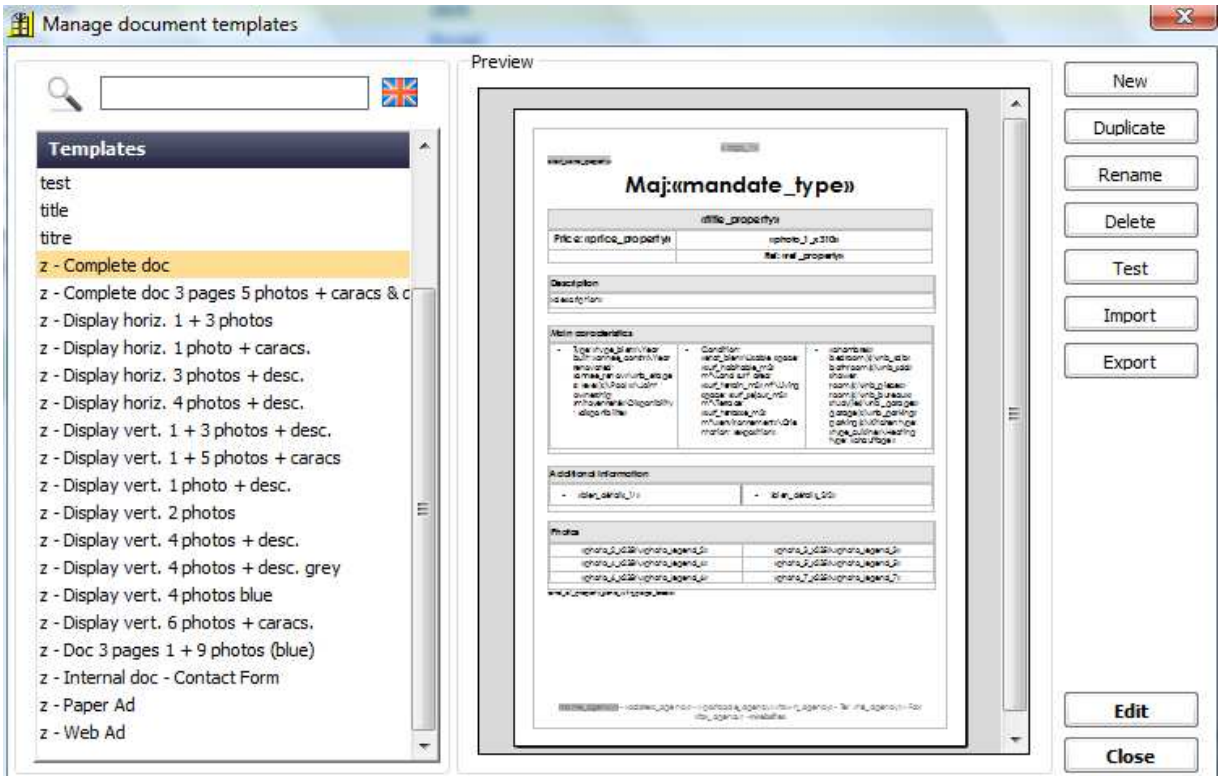
In addition to its tremendous property and contacts management capabilities, **Activimmo** also integrates a word processor. It is therefore possible to create and manipulate documents without using any other software.

We have already seen the automatic creation of a document (using **Activimmo** templates) in the section of the manual concerning documents. Here we will see how to create your own document templates.

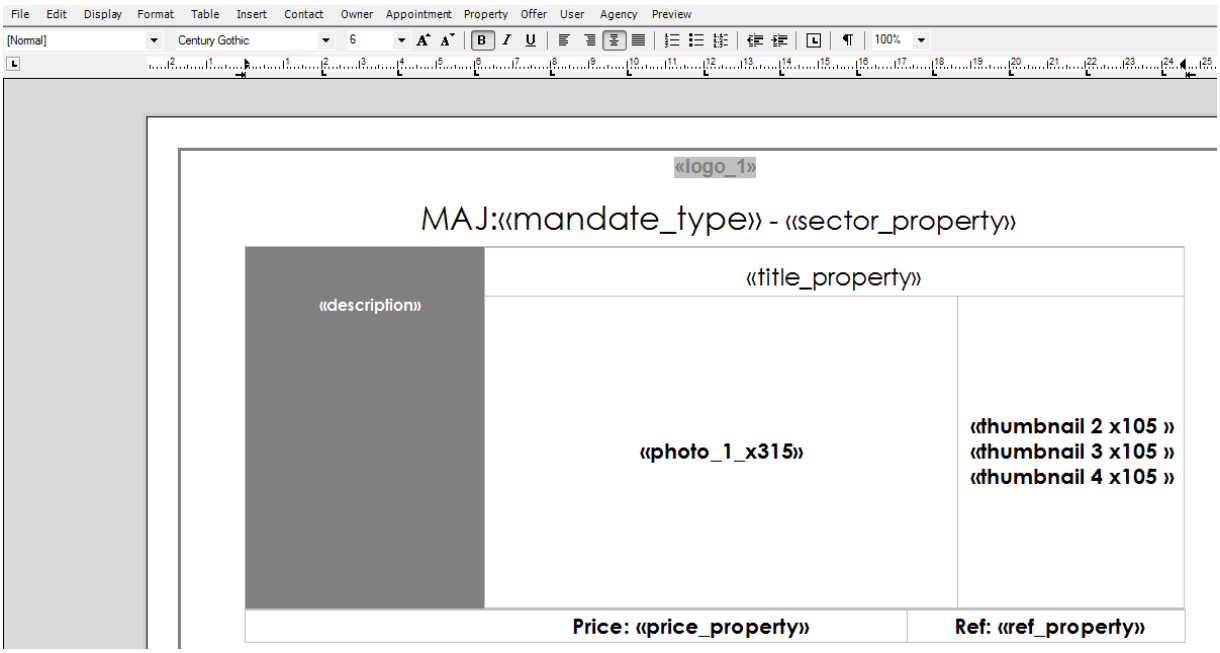
Creating your own document templates is done through the **Customize data menu**, by clicking on **Document Templates**.



This gives you access to the **document templates manager**:

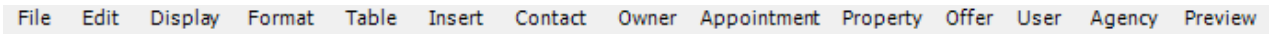

Manage document templates
Templates
test
title
titre
z - Complete doc
z - Complete doc 3 pages 5 photos + caracs & c
z - Display horiz. 1 + 3 photos
z - Display horiz. 1 photo + caracs.
z - Display horiz. 3 photos + desc.
z - Display horiz. 4 photos + desc.
z - Display vert. 1 + 3 photos + desc.
z - Display vert. 1 + 5 photos + caracs
z - Display vert. 1 photo + desc.
z - Display vert. 2 photos
z - Display vert. 4 photos + desc.
z - Display vert. 4 photos + desc. grey
z - Display vert. 4 photos blue
z - Display vert. 6 photos + caracs.
z - Doc 3 pages 1 + 9 photos (blue)
z - Internal doc - Contact Form
z - Paper Ad
z - Web Ad
Preview
Maj:«mandate_type»
New
Duplicate
Rename
Delete
Test
Import
Export
Edit
Close

From this window, you must select a template from the list and click on the **edit button**. You will then have access to the integrated word processor:



Operating the word processor

The word processor integrated in **Activimmo** has the same appearance as any other word processor.



In addition, it offers the possibility to insert elements from your database in the form of merge fields.

Merge Fields: space to ***insert text*** (eg: Names, addresses, details, etc... about your properties and contacts) ***or images*** (eg: Property photos from the **Activimmo** database).

Merge fields can be recognised as the **text is usually in-between quotes** and has a **grey background when you click on it.** For example: **«name_contact»**

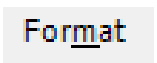
You can therefore create your own document templates that will be automatically completed by the appropriate information in the desired locations concerning contacts and properties concerned.

When opening the word processor (Text editor), you will notice the classic menus: **File, Edit, Display, Format, Table** and **Insert** that list the usual functions such as saving, opening files or arranging the page layout of the document, etc.

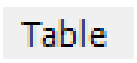
The **File menu** allows you to edit the layout, print settings, sending by e-mail...

The **Edit menu** integrates several standard features of the Edit menu of a word processor.

The **Display menu** allows you to change the display of your templates on the screen. You can easily access the header and footer of a document from this menu.



The **Format menu** allows you to customize the appearance of text by choosing its font, size, colour...



The **Table menu** allows you to insert or delete a table. When you insert a table, a window appears asking you how many columns

and rows you want to create.

Insert

The **Insert menu** allows the insertion of images, breaks pages, external documents or number of pages.

Preview

The **Preview menu** allows you to see the end result of a document as you create it.

The remaining menus will allow you to insert merge fields where the text cursor is located in your new document templates.

> ❖ **Note**:
>
> The **merge fields** names are **only visible in edit mode** and are surrounded by quotation marks: **« »**. They will then be replaced by the appropriate data of your contacts and properties (the software may ask you to select a contact or a property, depending of the type of document, through additional windows) during the automatic creation of your document.

Contact

The **Contact** menu: allows you to include merge fields for contacts. In addition, in this menu you can access the merge fields concerning the client's notary. In case you have a property from another agency, you can insert these details using this menu.

Owner

The **Owner** menu: allows you to include merge fields on a property owner. You can also access the data regarding the owner's notary.

Appointment

The **Appointment** menu: allows you to include merge fields for the appointment with a contact.

Property

The **Property** menu: allows you to include merge fields about the property as well as all financial data regarding your properties.

Offer

The **Offer** menu: allows you to include merge fields concerning the offer on a property. You can also access the data concerning the buyer, the owner, the commissions etc.

User

The **User** menu: allows you to include merge fields concerning various information types such as the current date or all data about the user.

Agency

The **Agency** menu: allows you to include merge fields concerning the Agency (name, logo, address, etc). The merge field **«today's_date» (Creation date of the Doc.)** will be replaced by the date of creation of the document and not the

date of the creation of the document template.

❖ **Note:** The automatic creation of a document is made from tabs «**documents**» from the various management windows as well as from clicking on «**Create Document**» from the **Tools** menu or by using the keyboard shortcut **F11**.

During this automatic creation, windows appear and prompt you to **select a document template** as well as a property(ies) and the contact(s) linked to it. The system then handles the automatic creation by replacing the merge fields with the property(ies) and contact(s) data: your document is ready in a few clicks.

Example:

«address_property», will be replaced by the address of the selected property when creating a document, for example: 25, Port Road.

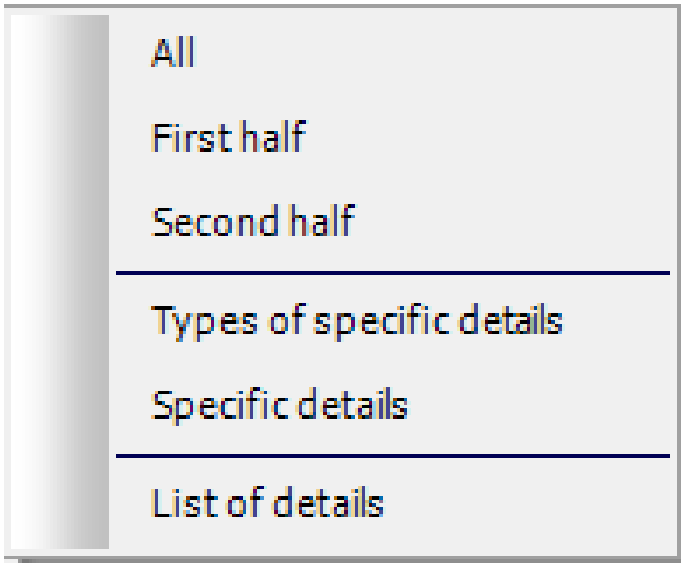
Summary Table:

	Document Template	Automatic creation of document
Data processing	**Merge fields**	**Actual data**
Example	**«address_property»**	**25 Port Road**

To create your customized template, click on **Document templates** from the **Customize data menu** and then click **New**.

Inserting details in your document templates:

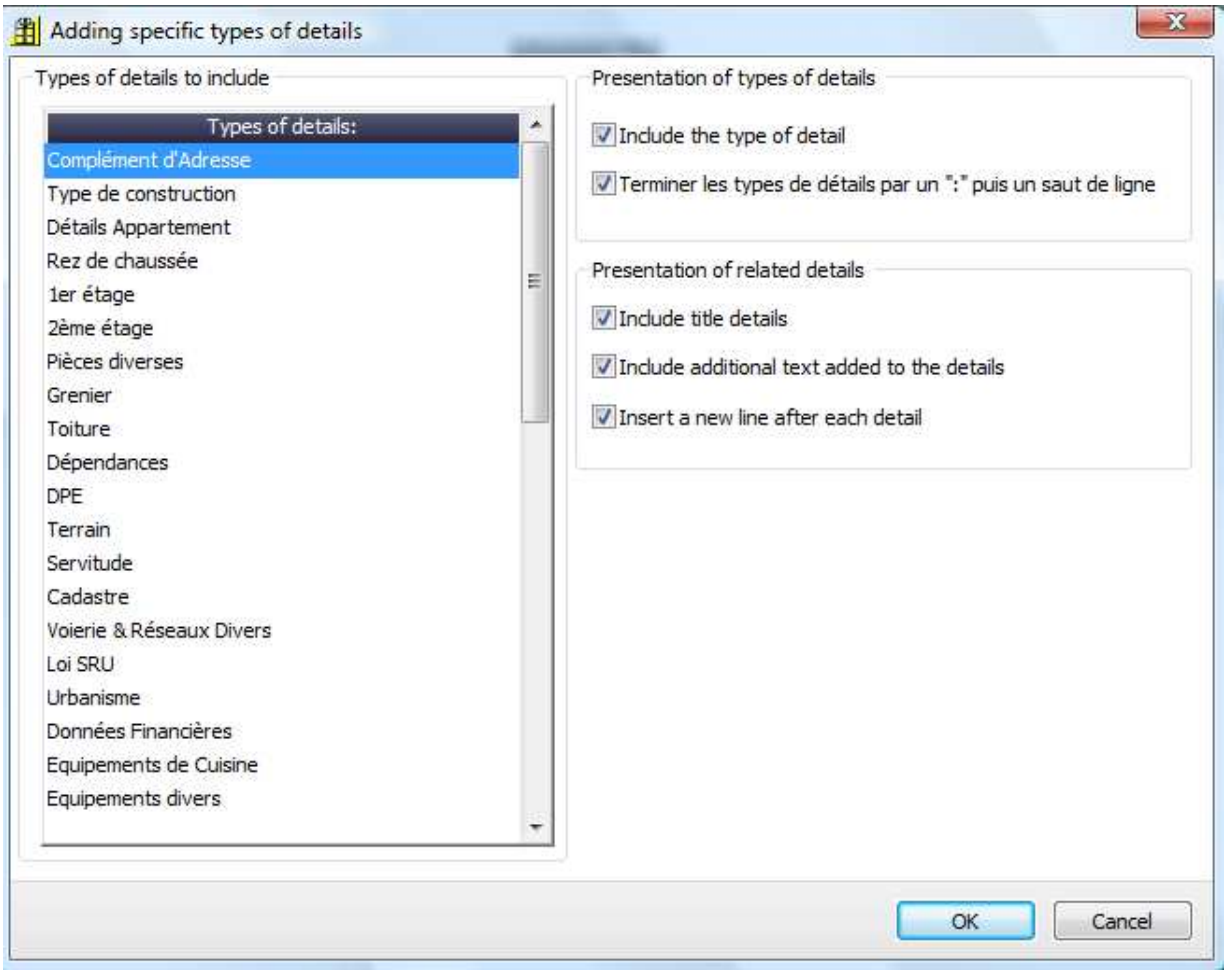
To insert customized details in your documents, click on the **Property** menu and select **Details**: 6 options appear (**all, First half, Second half, Types of specific details, Specific details** and **List of details**).



If you select **Types of specific details**:

1 – A window will open and offer you a list of types of details.

$



2 - Select the ones you wish to insert.

3 - The software will insert them in your document.

Example: If you select the detail $ **«Other rooms»** $, the software will bring up all the details related to this designation.

❖ **Note**:

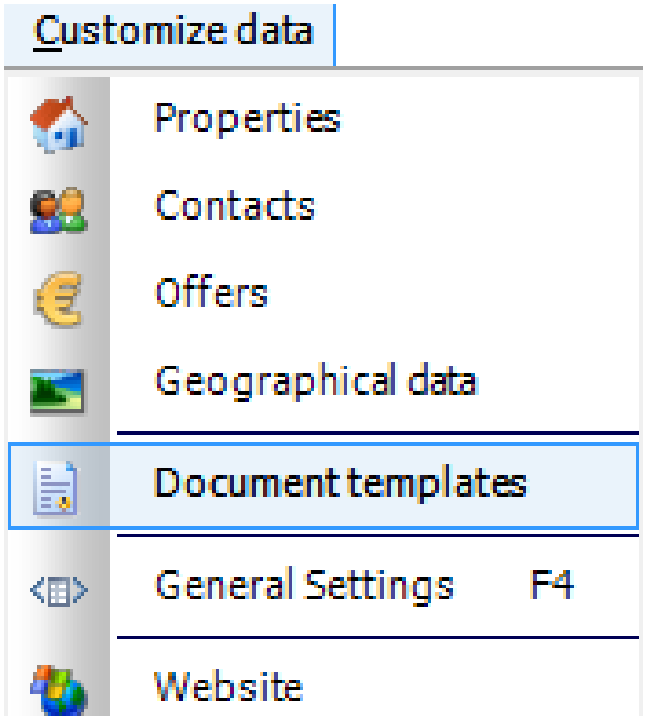
The word processor is compatible with **Word**. Thus, exchanging documents can be done with these two softwares using **copy / paste** or by clicking on this icon.

You can also export your documents in **PDF format** by clicking on this icon.

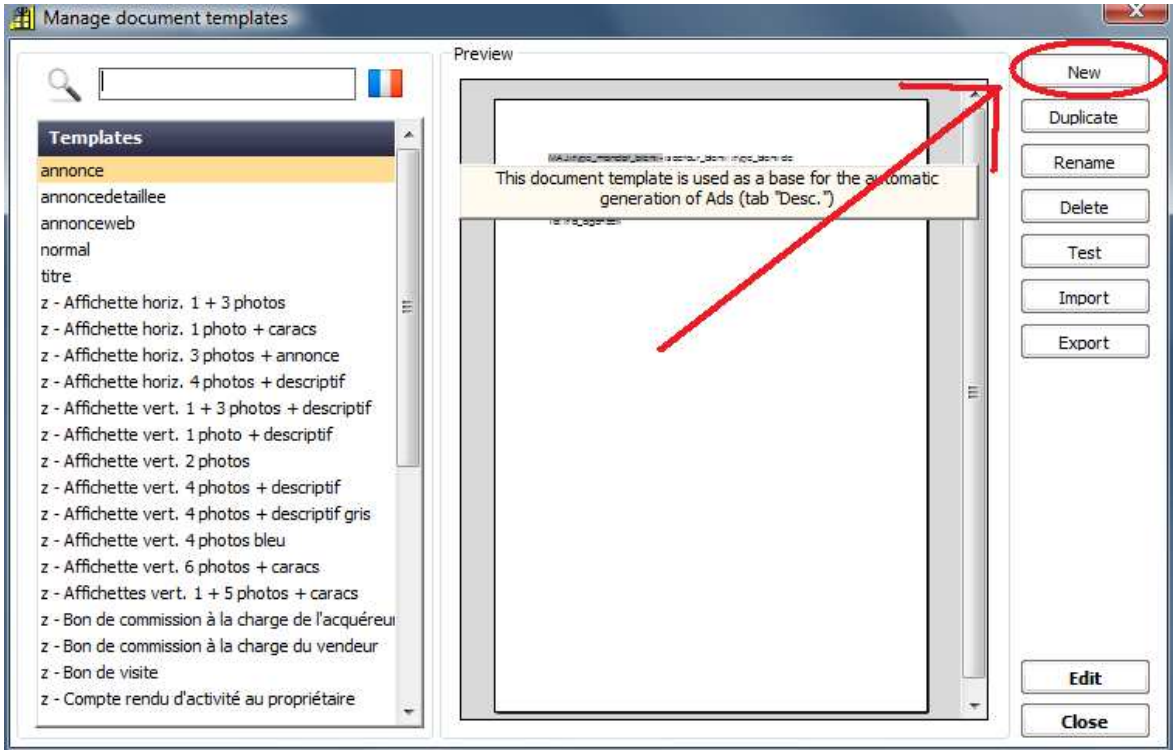
Create a document template

Follow these steps to create your own document template:

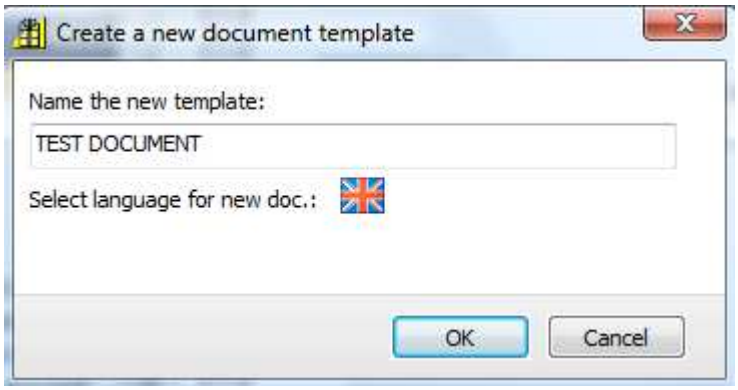
- From the **Customize data** menu, select **Document templates**



- When the window **'Manage document templates'** opens, click on **'New'**.


Manage document templates
Preview
Templates
annonce
annoncedetaillee
annonceweb
normal
titre
z - Affichette horiz. 1 + 3 photos
z - Affichette horiz. 1 photo + caracs
z - Affichette horiz. 3 photos + annonce
z - Affichette horiz. 4 photos + descriptif
z - Affichette vert. 1 + 3 photos + descriptif
z - Affichette vert. 1 photo + descriptif
z - Affichette vert. 2 photos
z - Affichette vert. 4 photos + descriptif
z - Affichette vert. 4 photos + descriptif gris
z - Affichette vert. 4 photos bleu
z - Affichette vert. 6 photos + caracs
z - Affichettes vert. 1 + 5 photos + caracs
z - Bon de commission à la charge de l'acquéreu
z - Bon de commission à la charge du vendeur
z - Bon de visite
z - Compte rendu d'activité au propriétaire
This document template is used as a base for the automatic generation of Ads (tab "Desc.")
New
Duplicate
Rename
Delete
Test
Import
Export
Edit
Close

- Insert the name of your document template in the window that follows (Example: TEST DOCUMENT) and click **OK**.



- A document will open. **We recommend that you close this document** using the cross **(X)** in the upper right of your screen. By doing so, you will have access to the **'Preview'** function which will help you visualise your document as you create it.

Note: You must click on the document template's name on the left (to select it) and click on **'Edit'** in order to proceed.

When you open the document, you will see the name of your template at the top of the page. You will also notice that the

template (which is based on the basic template: **Normal**) has a merge field (LOGO) inserted in the header of the document as well as merge fields inserted in the footer: Agency name / Address / Tel / Fax and Website.

If you want to delete these merge fields, you will need to double click on the header / footer section to select this, click once in the middle of the merge field and press the **'Delete'** key on your keyboard.

For a document **template** (text) which is sent in an email (Example: **Email content**), **the header and footer are not taken into account**. Therefore, you can remove this information.

TEST DOCUMENT.en
File Edit Display Format Table Insert Contact Owner Appointment Property Offer User Agency
[Normal] Arial 11
«logo_1»

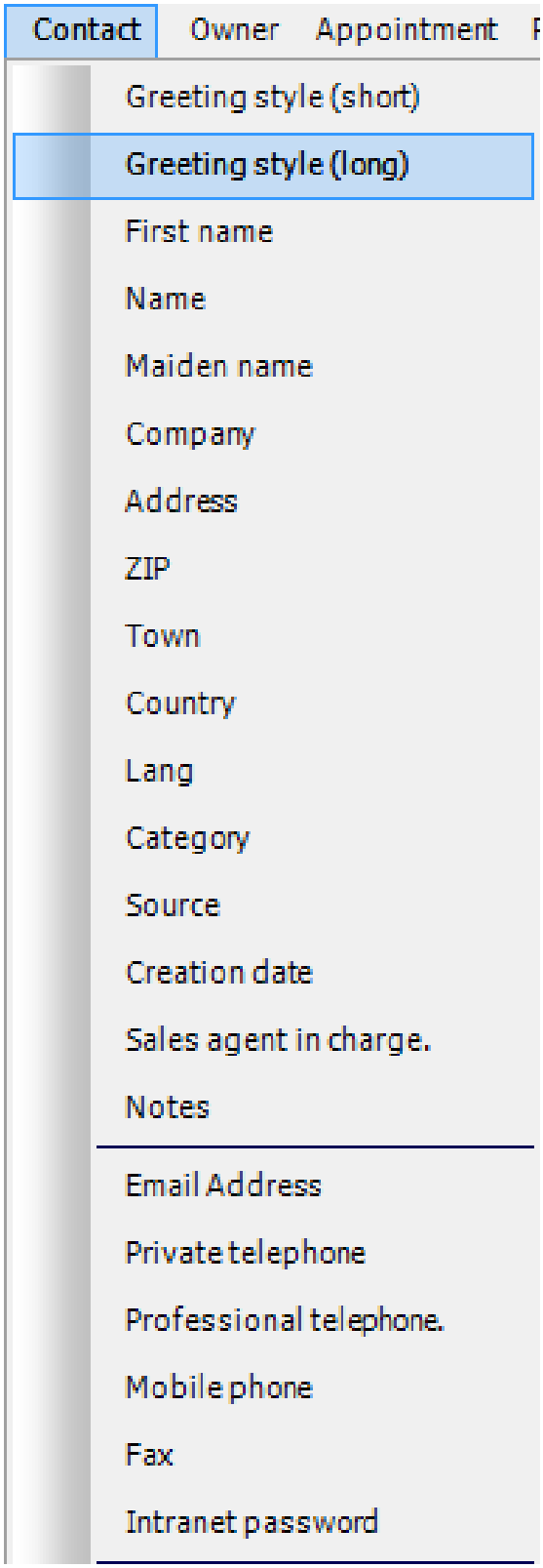
You are now ready to create your document template.

Note: As mentioned above in the section: **Operating the word processor**, the top menu is similar to other word processing editors.

You can add **merge fields** relating to the **Contact;** the **Owner**; the **Appointment**; the **Property**; the **Offers**; the **User** and the **Agency**.

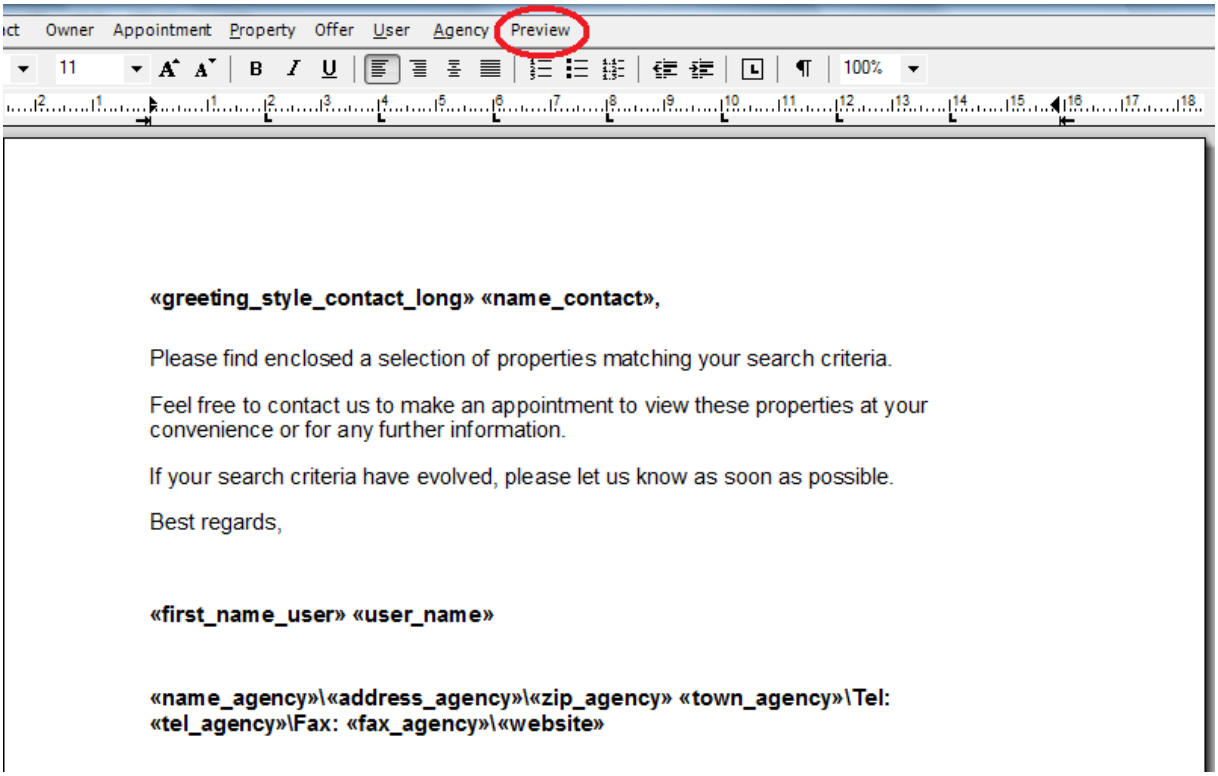
In our example, we will create an email content for a contact:

- Position your cursor on the first line in your document and click.
- Click on the menu '**Contact'** on top of the screen and select **'Greeting style (long)'**, you will see the merge field: **«greeting_style_contact_long»** appear in the document. Press the '**space bar'** on your keyboard.
- Click once more on '**Contact'** and select '**First name'**, you will see the merge field: **«first_name_contact»** appear after the 'greeting style' and the 'space'. Press the '**space bar'** once more on your keyboard.
- Click on **'Contact'** and select **'Name'**, you will see the merge field **«name_contact»** appear (as explained above).



- **Insert the content of your message** and if you have data to insert concerning the **property**, you will be able to add it using the menu '**Property'**; if you have data to insert concerning the owner of the property, you will be able to do so using the menu '**Owner'** etc.

Your document now looks like this:


Owner
Appointment
Property
Offer
User
Agency
Preview
11
100%
«greeting_style_contact_long» «name_contact»,
Please find enclosed a selection of properties matching your search criteria.
Feel free to contact us to make an appointment to view these properties at your convenience or for any further information.
If your search criteria have evolved, please let us know as soon as possible.
Best regards,
«first_name_user» «user_name»
«name_agency»\«address_agency»\«zip_agency» «town_agency»\Tel: «tel_agency»\Fax: «fax_agency»\«website»

WARNING:

- ➔ When you see this symbol: << **** >> (back slash) in a merge field, this means that the corresponding data will appear on a **new line** when you merge the document.
- ➔ The word ' **MAJ:** ' added in a merge field means that when merging the document, the **text** will appear in **Uppercase**.
- ➔ The word ' **MIN:** ' added in a merge field means that when merging the document, the **text** will appear in **Lowercase**.

We also offer the possibility to **add text in the merge fields** in order to make your documents more dynamic.

- ➔ This way, if a **merge field inserted does not match the data** inserted in a property for example, **this field will not appear in the final document**.
- ➔ If the **inserted data includes the information** that we require, the **merge field along with the inserted text will appear in the final document.**

Example : James Bond

Merge field: **Name: «name_contact»**

➔ If the contact's name is in the database, when you merge the document, you will be able to read:
Name: Bond

➔ If a contact's name is not in the database, **this line of text will not appear in the document when you merge it**.

THE FUNCTIONS MENTIONNED ABOVE MUST ONLY BE USED BY AN EXPERIENCED USER AS HANDLING MERGE FIELDS IS VERY DELICATE AND MAY RESULT IN LOSS OF DOCUMENTS !

- To view your document, click on '**Preview'**

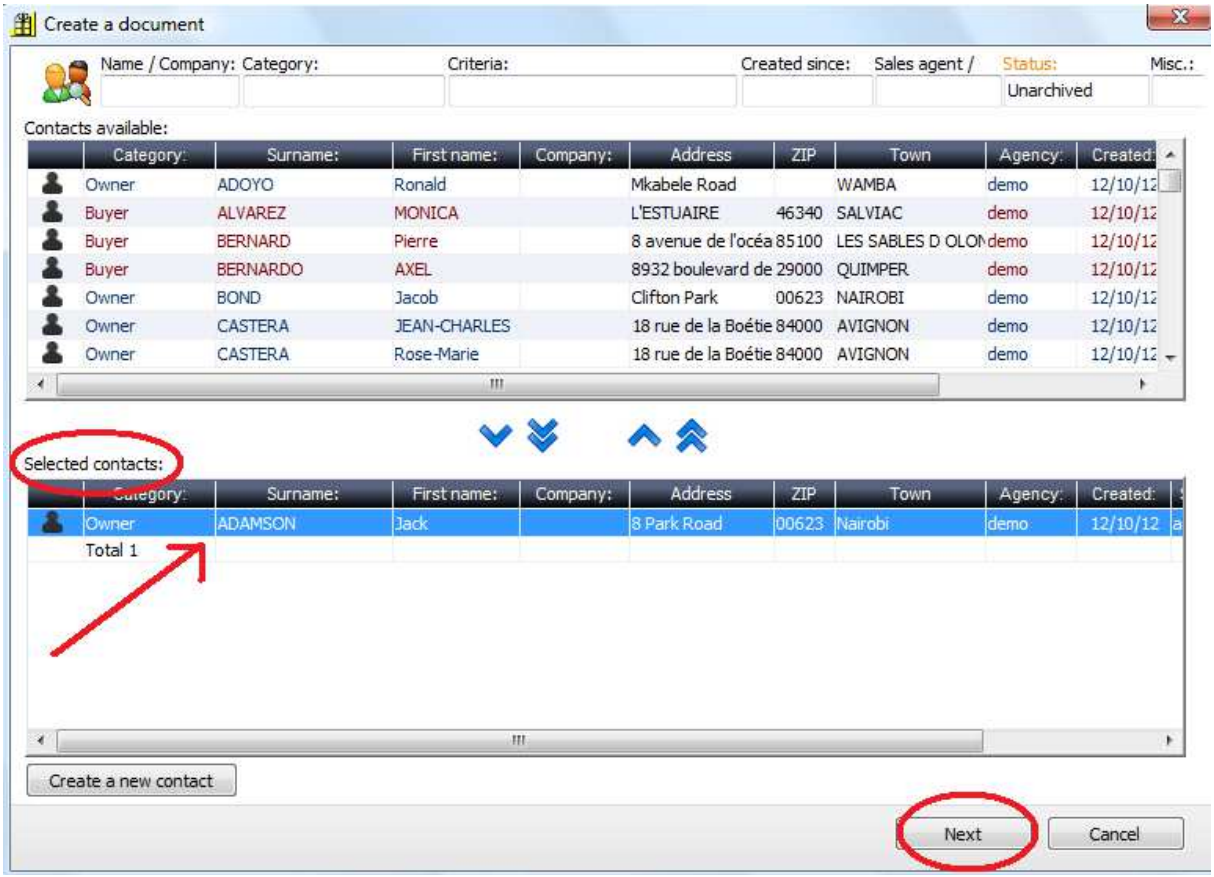
  Activimmo will ask you if you want to '**Save the document',** click on '**Yes**' in the window that opens.

- A second window opens and prompts you to **select a contact.**
  Select a contact by double clicking on the row of the contact. You will see the contact move to the bottom section of the screen '**Selected contacts'.** Then click on **'Next'.**

Note: You can select more than one contact by double clicking on each line or you can use the blue arrows:

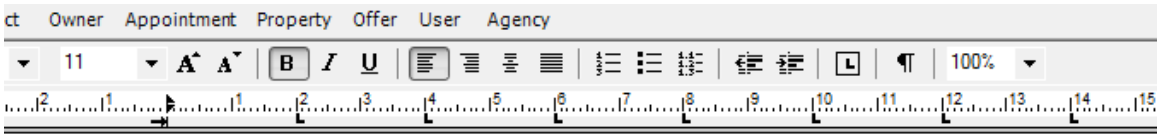
➔ The single arrows are used to select / deselect **contacts one by one**.

➔ The double arrows are used to select / deselect **all contacts at the same time.**



You will then see your document appear on the screen and the merge fields have been replaced with the contact's data (when you selected a contact in the previous window).

The merge fields can be seen in **bold** below: $



Mr & Mrs ADAMSON,

Please find enclosed a selection of properties matching your search criteria.

Feel free to contact us to make an appointment to view these properties at your convenience or for any further information.

If your search criteria have evolved, please let us know as soon as possible.

Best regards,

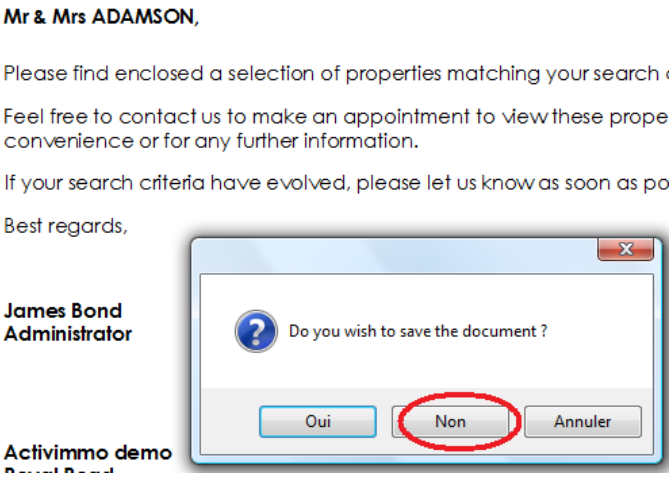
James Bond
Administrator

Activimmo demo
Royal Road
Grand Baie
Tel: + 211 12345678
Fax: +211 12345679
www.activimmo.com

Once you are satisfied with the document template, you can close it by clicking on the cross on the top right hand corner of the screen.

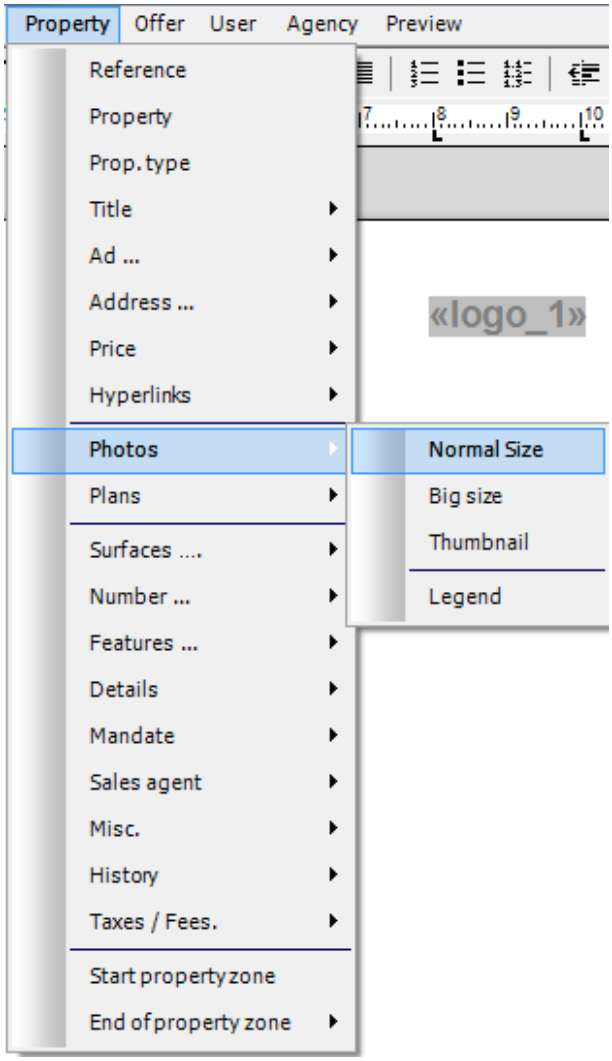
Note: There is no need to **save a document** when you preview it.

Therefore, you will say '**No'** in the window that follows:


Mr & Mrs ADAMSON,
Please find enclosed a selection of properties matching your search
Feel free to contact us to make an appointment to view these prope
convenience or for any further information.
If your search criteria have evolved, please let us know as soon as po
Best regards,
James Bond
Administrator
Activimmo demo
Do you wish to save the document ?
Oui
Non
Annuler

Inserting a photo in a document template

- In your document template, place your cursor where you want to add your photo.
- Click on the menu '**Property'** and choose **'Photos',** then select the size of the photo.

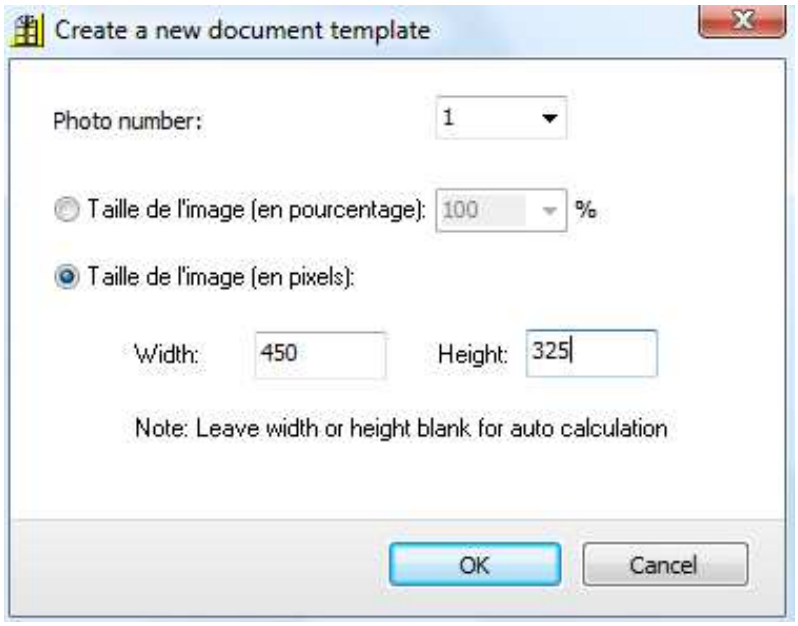


- A window then opens and you will have the following options:

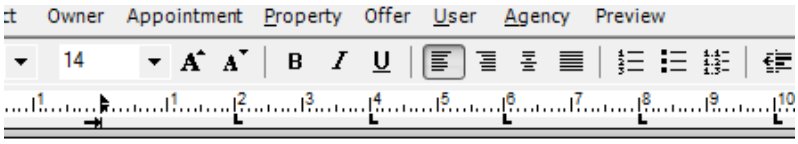
1. **Photo number** (in the order that they are featured in the '**Properties'** page, in the '**Media**' tab.
2. The **size** of the image **in percentage.**
3. The **size** of the image **in pixels.**

This option will allow you to block the length and width of your photos to avoid the overflowing when creating documents, in case your photos have different sizes. (They will be locked in a frame).

Example: panoramic photos compared to a standard photo taken from a digital camera). $



- Once done, click on **OK** to validate. The merge field for the photo will now appear on your document template (including the size entered in the previous screen if you chose the **size in pixels** option.):

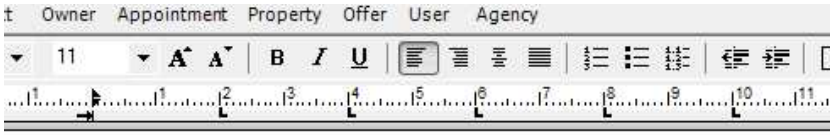


«logo_1»

«photo_1_450x325»

- To view your photo, click on **'Preview'**, answer **'Yes'** when asked if you want to **save the document,** then **select a property** in the following window. (same proceure as descrived above). Then click on '**Next'.**

The photo has been merged in your document template:



There are many options offered through the document template creation window such as: inserting tables, add borders, change the text color, change the background color, add 'styles' to the text (Title 1 / Details, etc..), insert pictures (with captions) insert site plans, print documents, export as PDF or Word document sent by mail ...

The list is long!

For further information about the creation of document templates, contact your Activimmo technician.

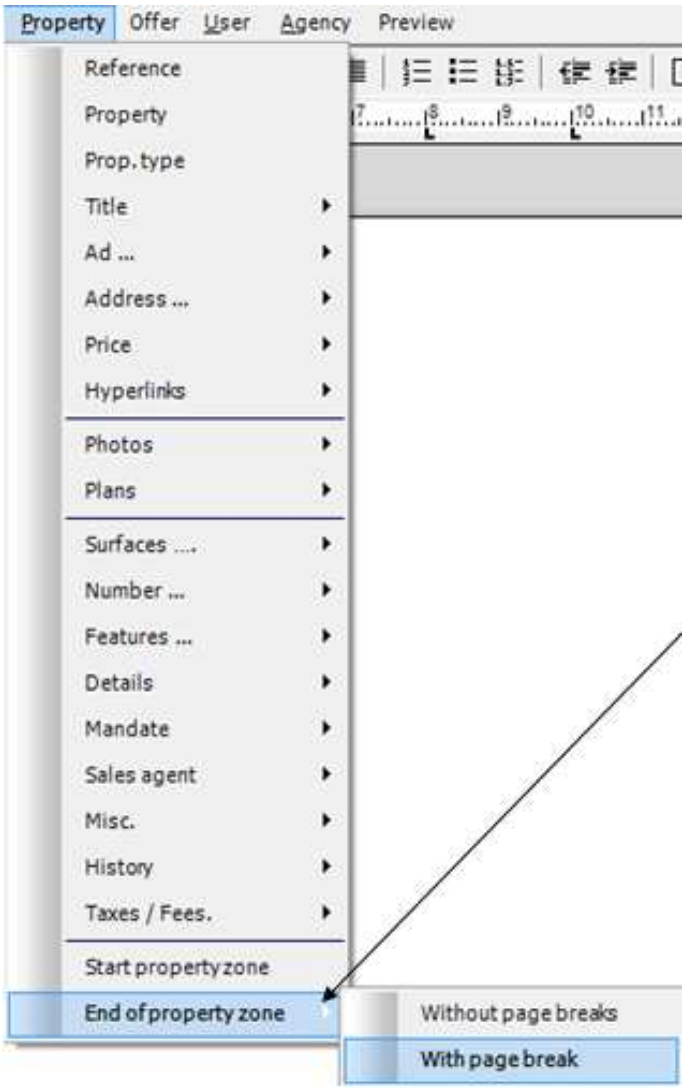
Multiplying properties

If you want to create a document for several properties, you must create a replicated and modified zone for each property.

Merge fields contained in this zone will be automatically replaced by the data of all the selected properties at the automatic creation.

To start this zone, you must use **Start property zone** from the **Property** menu.

To end this zone, you must use **End of property zone** from the **Property** menu.



Thus you will get a zone between these two limits:

Example of property zone:

«logo_1_agency»

«greeting_style_contact_long»
«first_name_contact» «name_contact»
«address_contact»
«zip_contact»
«town_contact»

«town_agency», on «today's_date»

«greeting_style_contact_long» «name_contact»,

We are pleased to enclose the description of the properties likely to be of interest to you.

We wish you good reception and are at your disposal to determine a visit at your convenience.

In case your search criteria evolves, we would greatly appreciate if you let us know so that we can continue to serve you in the best possible.

«start_zone_property»

«title_property»			
«thumbnail 1 100%» «thumbnail 2 100%»	«description»		
		Town :	«town_property»
		Usable area :	«usable_area_m²»
		Price :	«price_property»

«end_of_property_zone»

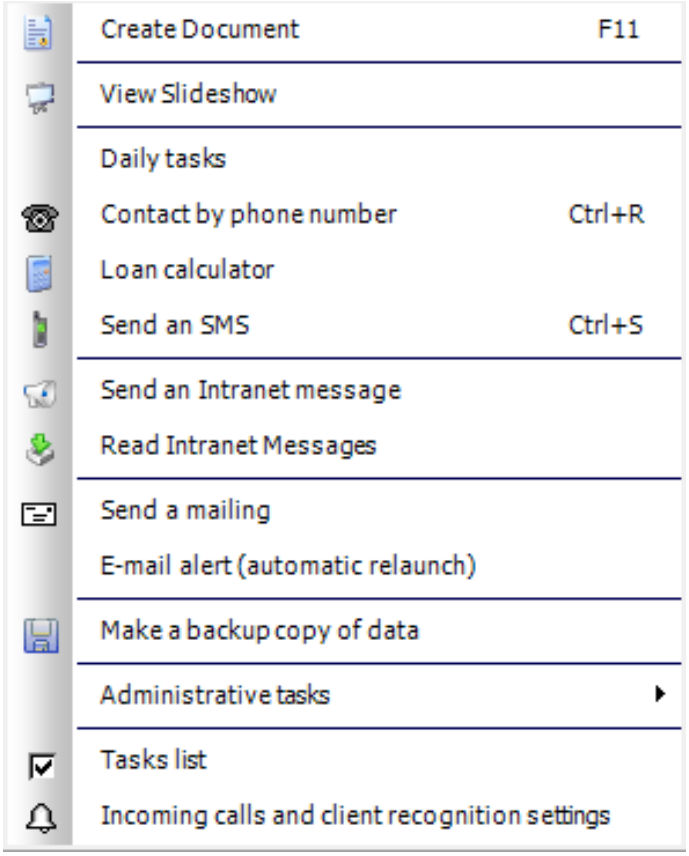
«greeting_style_contact» «name_contact», we remain at your disposal for any question you might have.

«first_name_user» «name_user»
«function_user»

Warning: The fields **«start_zone_property»** and **«end_of_property_zone»** do not correspond to data but to tags layout. The software offers the possibility to insert, with the tag **«end_of_property_zone»**, a page break to obtain, for example, one property per page.

Edit a document

1- Click on the **Tools** menu



2- Select **Create Document** (or press **F11**)

3- **Select** a **document** from the list and click «**Next**».

4- Select the **name of the as well as the property** that will appear in the document (The software allows you to choose).

5- Print the document(s) (**File** menu, **Print**) displayed on the screen once the software has integrated your data in the desired document.

6- Close the **Activimmo** word processor once your document is saved.

Edit a document template

1- Click on the **Customize data** menu.

2- Select **Document templates**.

3- The list of templates is displayed on the screen, select the **desired document template** and click **Edit**.

4- The word processor opens the selected document template.

5- **Edit** the document.

6- Close the window (**File** menu, **Exit**) or click on the little cross to close the page.

7- Then close the document templates management window. (The software will ask you if you wish to save your document by clicking on **OK**).

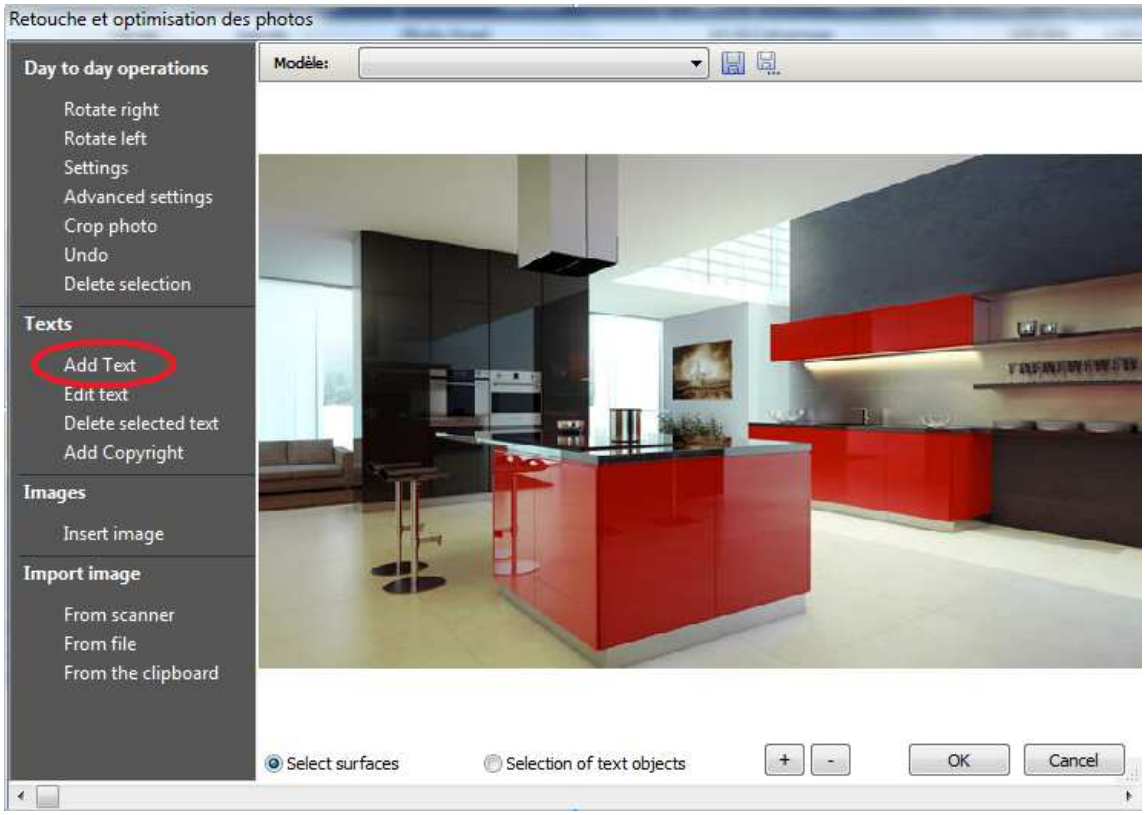
If you wish to train to generate document templates or customize them, go to tutorial No.3: **Document templates**.

Add text to photos

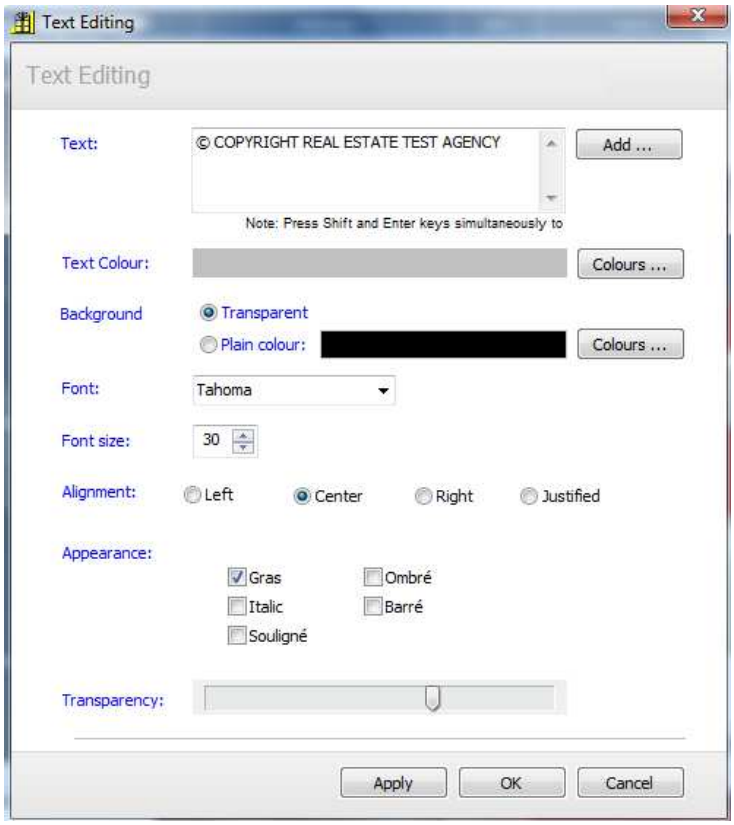
You can choose to add text, for example: **COPYRIGHT** on your photos to ensure that your photos are not used by others. You can create a 'template' and save it in the photo editor. By doing this, you can apply Copyright (or other text) directly to all your photos.

To do so, follow these simple steps:

- Add photos to a property in **Activimmo**.
- Select a photo and click on '**Edit'**. A window opens.
- Click on '**Add text**' on the left of the screen.

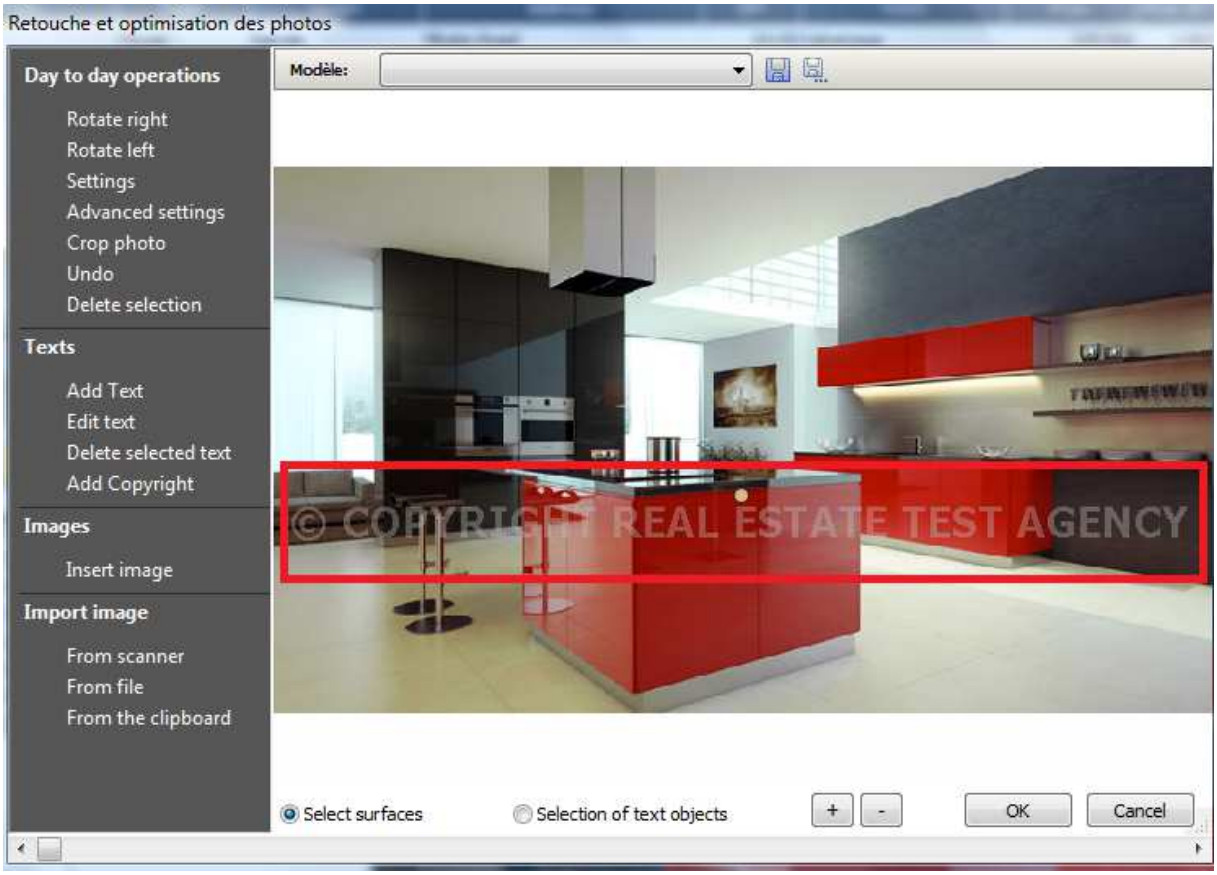


- **Insert the text** you want to appear on your photos and choose: the **text colour; background colour** (transparent or solid); **fonts** to be used; **alignment**; **appearance** and **transparency**. When you finish, click on **'Apply',** followed by **'OK'**.

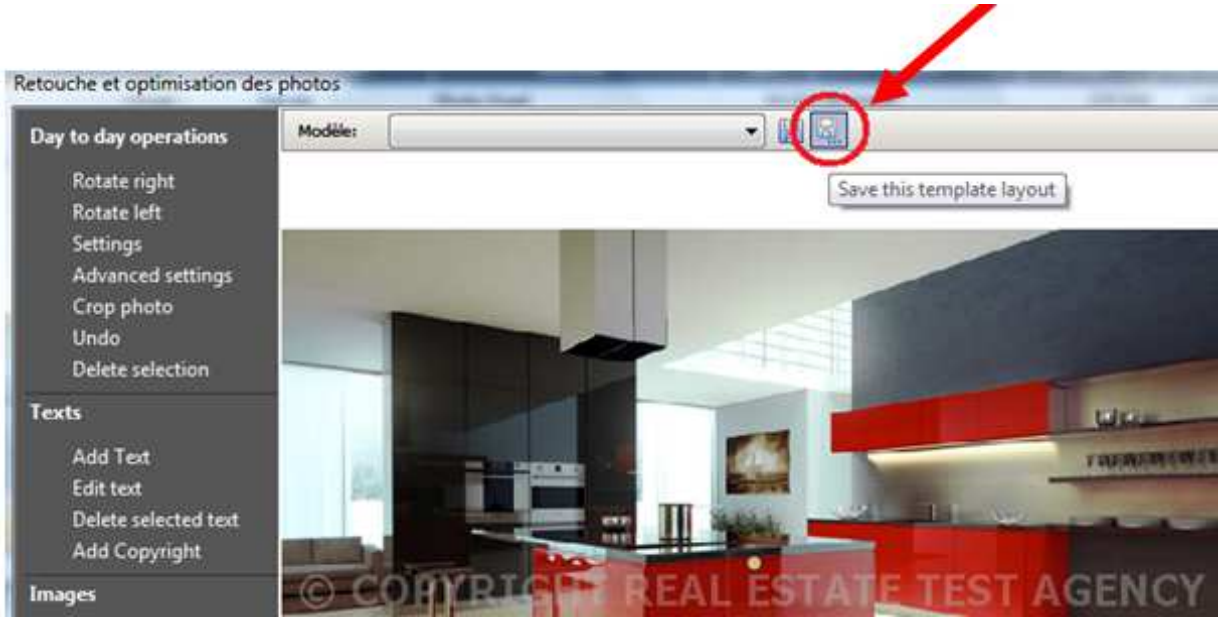


The text will appear at the top of your photo. When you position the mouse over the text, you will see a symbol appear in the shape of a cross. Click and move the text where you want it. When you are satisfied with the new text location, you will have the possibility to **save this 'template'** in order to be able to apply it to other photos.

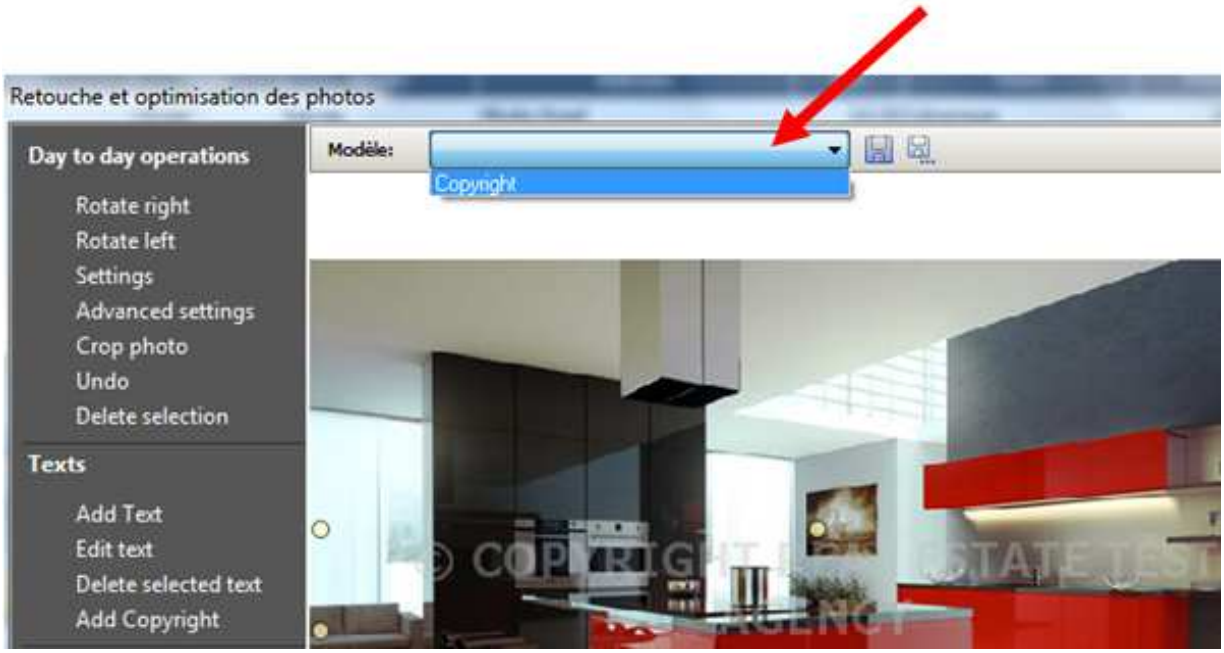
Note: To change the text color, transparency, etc., you must double-click on the text to open the photo editor or simply click **'Edit text'** on the left of the screen. $



- To **save the text template**, click the second icon on the top of the photo (the one on the far right: ***Save this template layout***). A window will open and you will need to insert the name of your template (eg: Copyright) and click **'Save'**. Your template 'Copyright' is now saved and is ready to be used on other photos. $



To access it, click on the arrow at the top of the photo (near the text: $ **Modèles** – next to the first 'save' icon). Select the template from the drop down menu and it will be automatically added to your photo (same place, same font size, colour, etc.) $



<u>WARNING</u>:

When you click **OK** to validate, the text will be embedded into the photo and you will **<u>no longer be able to edit it</u>**.

Web Functionalities

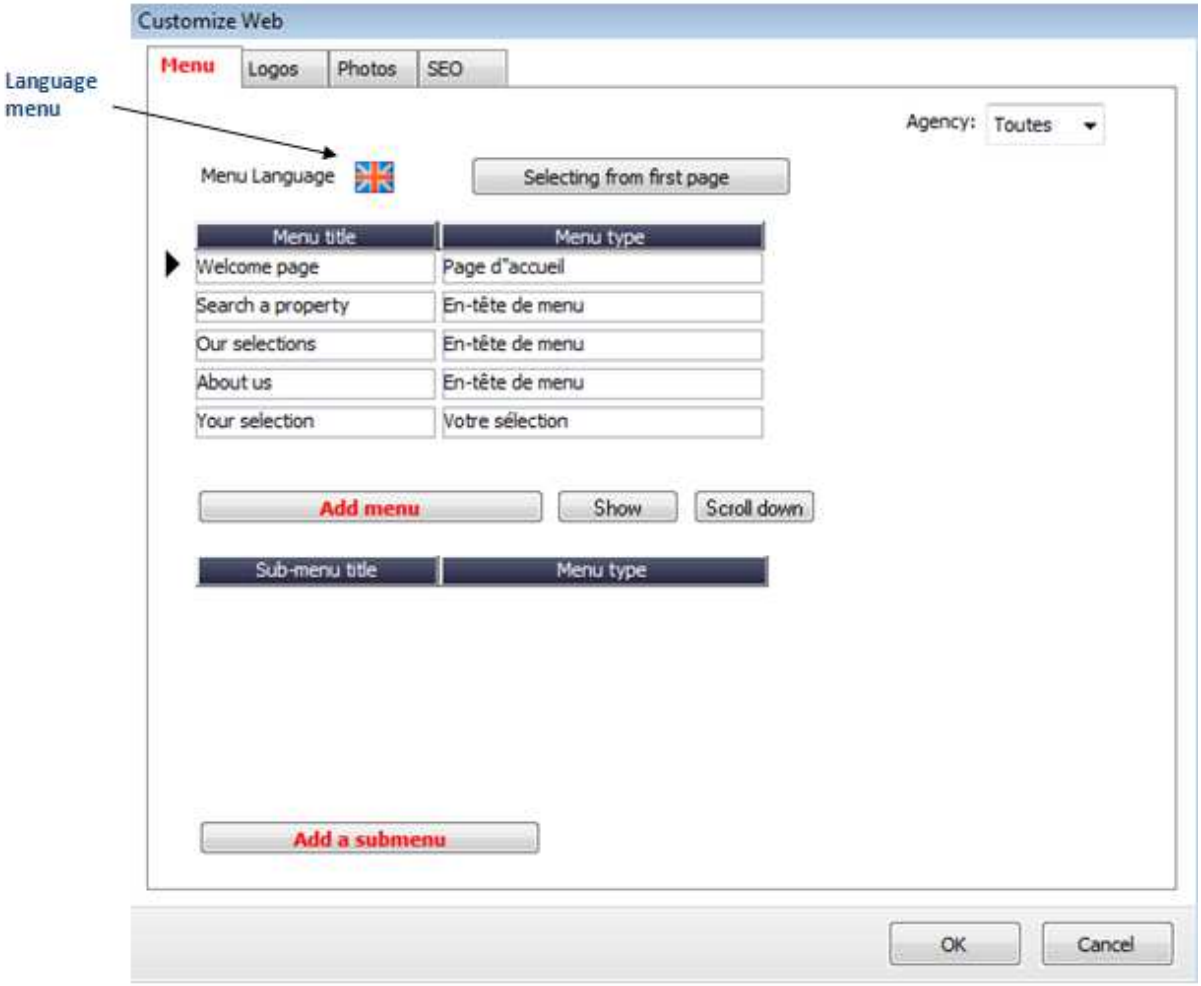
Activimmo, in addition to its great capacity to manage properties and contacts, is also an effective tool dedicated to **publishing properties on the Web**. It is therefore possible to sell or offer properties in your own country as well as worldwide.

- To publish or update your Website, select the **Web** menu and click on **Update Website**. A window allowing you to transfer your data to your Website will appear. After introducing the access settings to your website for the first time, click on the button **Publish** to update your Website.

Customizing your Website

Activimmo allows you to customize your Website. Thus, you can choose the pages you wish to have on your Website; create new pages or even choose the home page of your Website. You also have the possibility of having a multilingual Website.

To access these customization options, go to the **Customize data** menu and click on **Website**.$



- The **Menu** tab**:** This tab allows you to **fully manage** your **Website menu.**

Tab description:

- The drop-down list **Menu Language** allows you to choose which menu you are working (**English**, **French**, **Dutch menu,** etc.)

❖ **Note:** For a **multilingual Website**, you must first go to the **Customize data menu** → **Geographical data**, select the **Languages** tab and check the box to **include** the desired language. This is also where you can choose the welcome text, in different languages, that appears on the home page of your Website.

- The button Selecting from first page gives you the **opportunity** to **select the landing page** for the user once he clicked on the welcome text in the desired language.

- The first table displays the **titles** of your **menu** on the left half. On the right, you have the **types of links** which will point to the titles. (Homepage, search page, customize page, headings, etc).

- The second table is displayed in the event of a **Headings menu**. It is identical to the previous one except that it is for **sub-menus.**

You can add menus and sub-menus using the buttons created for this purpose.

- To delete a link, right click on it and choose **Delete**.

The **Logos** Tab: This tab allows you to upload your logo in different formats to be used in **Activimmo**. Thus, you can upload your small and medium-sized logos as well as the one used for your documents. You can also choose the image that will appear on your Website's home page.

The **Photos** tab**:** This tab allows you to upload your photos by giving them a specific size (height, width, compression, etc).

The **SEO** tab**:** This tab allows you to include, in your Web pages, keywords in multiple languages that characterize your business and the properties you sell the most. This information will be used for your Website ranking on Internet and will then be used by search engines on Internet.
If your keywords are well chosen to describe your business, your Website will perform better and you will see an increase in your commercial repercussions.

Even more Web

If you want even more services for your Website, contact us to find out about the various options available: creating slideshows, reserving domain names, SEO strategy, etc.

Manage Users

The Users window enables you to record the **contact information** of **sales agents** and **manage their access rights** in **Activimmo**.

The administrator will handle this window and manage users.

To open the user window, select **Administer Activimmo Users** from the **Management menu**.
This page consists of a main tab with a table in the center. The table displays key information about users.

To add new users, click on **«Add»** or press the keyboard shortcut **F5** or select **«Insert new data»** from the **Edit** menu and select the appropriate access rights. You can also find this action (**Create**) in the contextual menu, when right-clicking, in the employees table.

You can also switch between different users by clicking the two buttons at the bottom left of the window:

Access Rights:

It is essential to grant the utmost attention when allocating access rights to sales agents, indeed, **Activimmo** offers **three possibilities:**

1- **View:** The sales agent can only view the information in the database and can not modify or create new records. It is therefore of **restricted access** and **read-only.**

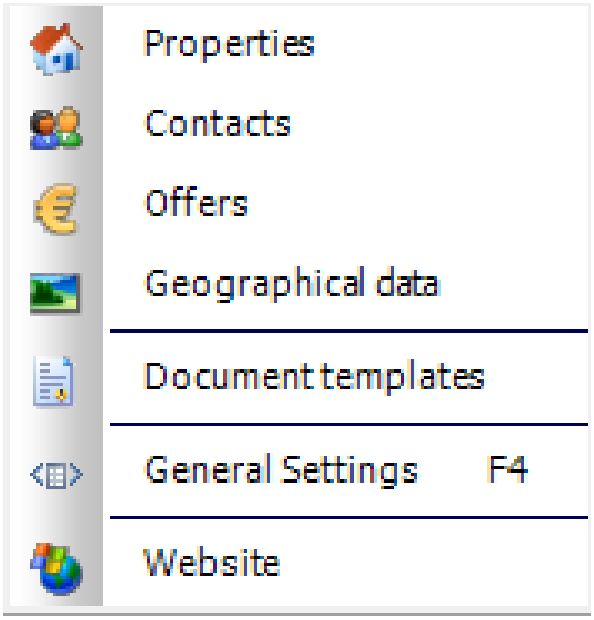
2- **Normal:** The sales agent can view the information in the database, create new records and edit his own records but not those of other sales agents. It is therefore the **standard access right type** for **employees** of a **real estate agency**.

3- **Administrator:** It is the **access right** of the **agency manager**, in fact, besides the similarities with normal access rights, it allows all modifications to the database, whether it's your own records as well as those of other users. Only the administrator can create new sales agents and assign their access rights. He is also the only one able to access the customization features of the application (customizing menus, update SEO, etc.)

Customize data

After launching **Activimmo**, the first thing you see is the interface, the window or screen area in which you work. This interface is your work plan. From here you have access to all **Activimmo** tools.

To access the customization settings, you must go to the **Customize data** menu, and then select the desired operation.



Customize/Properties: Allows you to set the basic data used by the property window. You can also customize the default values that appear in the property input form and the types of details available.

Editable parameters:

Property:	Land, parking, chateau, business premises… You can add all the categories you need, in several languages, by clicking on **Add** or by doing a right click and selecting **Create.**
Property Types:	A country cottage, lodging, a dungeon, a farm, a country mansion, a mill, a fort … You can customize your property types, without any limit
Kitchens:	This is the type of kitchen in the property: American, fully equipped, fitted…

Heaters / **Water Heaters:**	This is the type of heating / water heater used by the property: fuel, electricity, heating / gas water heater...
Conditions:	This is the condition in which the property is: to renovate, good or bad condition. You have the ability to be concise or precise when describing the condition of the property.
Surroundings:	This is the area where the property is located: rural, suburban, downtown, waterfront, mountain...
Operations:	This is the Mandate type of the property: sale, rent, holiday rental...
Zones:	It is the zone of the asset: offices, holiday, residentia...
Styles:	The style of the property: architect, contemporary, character…
Events:	These are all the types of events that will be used in the property history and in the agenda in **Activimmo** (eg: relaunch, sending documents, etc...)
Availabilities:	This is the criteria that allow you to know whether a property is available or not, or when it will be. You can add all the criteria you want.
Details:	You can **define new detail categories** (description of the levels, inside the house, outbuildings, land, common areas...). In each of these details category, you can **delete** or **add** the **values** you want. The top section allows you to select, add or delete the detail categories, in multiple languages. The bottom section allows you to add or delete different values of your details (check boxes indicate that these criteria are listed on the Web page or can be used in documents). Example: For inside the house, the details can be: tapestry, visible stones, paintings, flooring, tiles, mosaic, linoleum... You are totally free and are not limited when customizing your categories of details.
Translation details	Allows you to translate the details used by **Activimmo** in English and other languages. **Note:** Remember to choose the secondary language in the drop down menu (top right).
Price range:	The price range is used in the search engine of the agency Website. You must first select an operation to view or add your price ranges.
Mandates:	This is the mandate associated to the property: co-exclusive, exclusive or non-exclusive.

Default data :	These are the default values displayed when you create a property.
Sources:	You can explain the source of the property (office, client's tip, etc...)
Tasks:	These are all tasks related to the property (advertising preparation, file constitution, real estate diagnosis, etc...)
Orientation:	The orientation of the property. Is the property facing North, South etc ...

All data customization that you can perform in **Activimmo** are unlimited and can be done in a single click.

Customize/Contacts

Allows you to set the basic data used by the contacts window. You can also set the default values which appear in the contact input form as well as the default criteria (**Criteria** tab in the contacts window).

Editable parameters:

Categories:	These are the types of contacts: contacts, clients, notaries, owners...
Greeting styles:	These are the greetings titles: Mrs, Miss, Sir...
Mat. Reg.:	This is the matrimonial regime of the owner or owners. (separation as to property / community of property, etc...)
Default data:	These are the default values automatically displayed when creating a new contact. (Country / categories, gender, etc…)
Sources:	These are the details of the source of the contact. (How did you meet the contact...)
Events:	These are all the types of events that will be used in the contacts history in **Activimmo** (eg: visits, relaunches, telephone contact, etc...)
Details:	These are all the details of your contacts.
Tasks:	These are all tasks related to the management of your contacts.

Customize/Geographical data

Allows you to set the basic geographical data of the software: create or edit towns, cities, sectors, countries and languages used by **Activimmo**.

Editable parameters:

Regions:	These are the regions where your properties are located. You can use several languages and enter all the regions you want. **Note:** Use the secondary language from the drop down menu for your translations.
Sectors:	These are geographic sectors where your properties are located. You can use several languages and enter all the sectors you want.
Towns:	These are the towns where your properties are located. You can use several languages and enter any city you want.
Country:	These are the countries where your properties are located.
Currencies:	These are the currencies used in the countries where your properties are located. You can define the conversion rate in relation to your local currency.
Languages:	These are the languages used in **Activimmo**. If you wish to have your Website in English or another language, check the box at the end of the row.

The **Activimmo** software has been designed in order to satisfy all real estate agencies. You can work in several languages, thus allowing you to work with foreign contacts worldwide. You can also edit the data concerning your users. In other words, if you have a new employee, he can easily be added to the list of existing users.

In addition, you can create your own document templates: **Activimmo** thus allows you to give a personal touch to your agency.

Export data to online Portals

Activimmo has a data transfer engine that allows you to transfer all the data you want to various real estate portals. Simply send a copy of your data.

When you want to publish your ads on a portal, it will have to be previously registered as an advertiser in **Activimmo** (See Section **Manage Ads**). Then, you will be able to select the **Web** menu and use the function «**Publish properties to a portal**... **»** to select the portal you want.

Take the example of **Belgimmo**: $

To export your data to this portal, you need :

- To insert your password
- To click on the button **Properties to publish.**

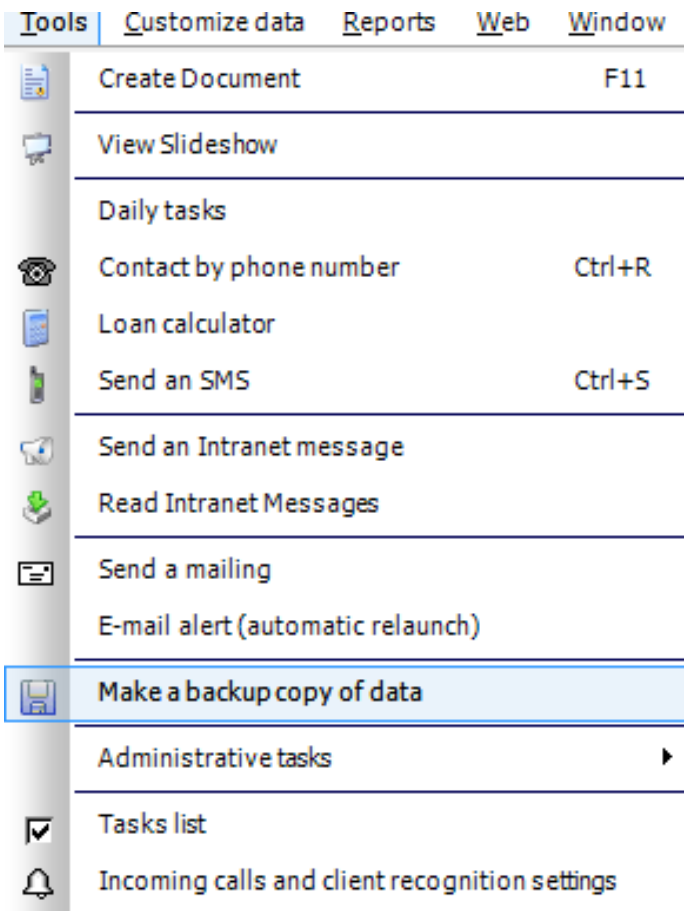
With this button, you can choose the properties that you want to publish from your database. You then have the option to publish all the properties or choose them according to specific selection criteria (town, amount, reference, etc...). Once you have selected the properties to be published, click **OK** and then click **Publish**. Your properties will then be published on the online advertiser's portal.

In this window, you can also choose to close the Internet connection and transfer all photos by checking the corresponding boxes.

Back up a copy of the data

Activimmo offers you the possibility to back up a copy of your data. This feature has been designed to ensure the safe keeping of your data should anything happen: virus / PC breakdown, etc...).

To do so, go to the **Tools** menu, which can be accessed via the **Menu**, and select '**Make a backup copy of data'.**



In the window that appears on the screen, you must:

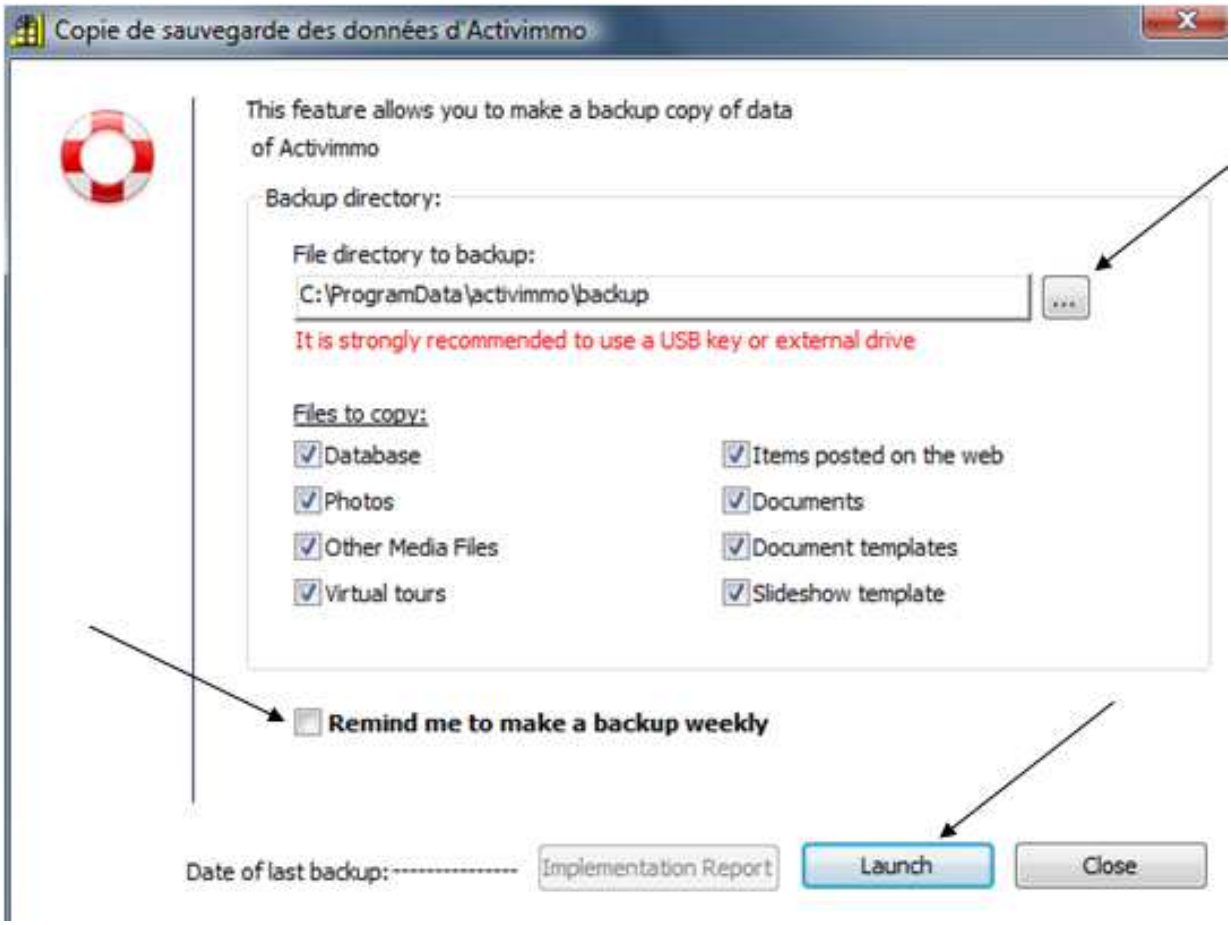
- Choose a backup directory in which Activimmo will put a copy of the data (to select the designated directory, click the icon with three dots on it: ...)
- Check the boxes that you wish to back up (database/ photos/ documents/ etc...)
- If you wish to be reminded weekly to do a backup, you must check the box '**Remind meto make a backup weekly**'.
- Once you are ready, click on the button **Launch** to start your backup.

❖ **IMPORTANT:**

It is strongly recommended to use a USB key or an external drive to backup your data.

Data saved on your PC can be lost in case of PC failure due to unforeseen circumstances (Virus / PC formatting etc).

ACTIVIMMO WILL NOT BE HELD RESPONSIBLE FOR THE LOSS OF DATA RESULTING FROM NON-COMPLIANCE WITH THE BACKUP PROCEDURE.



Annex: Tutorials to create a property

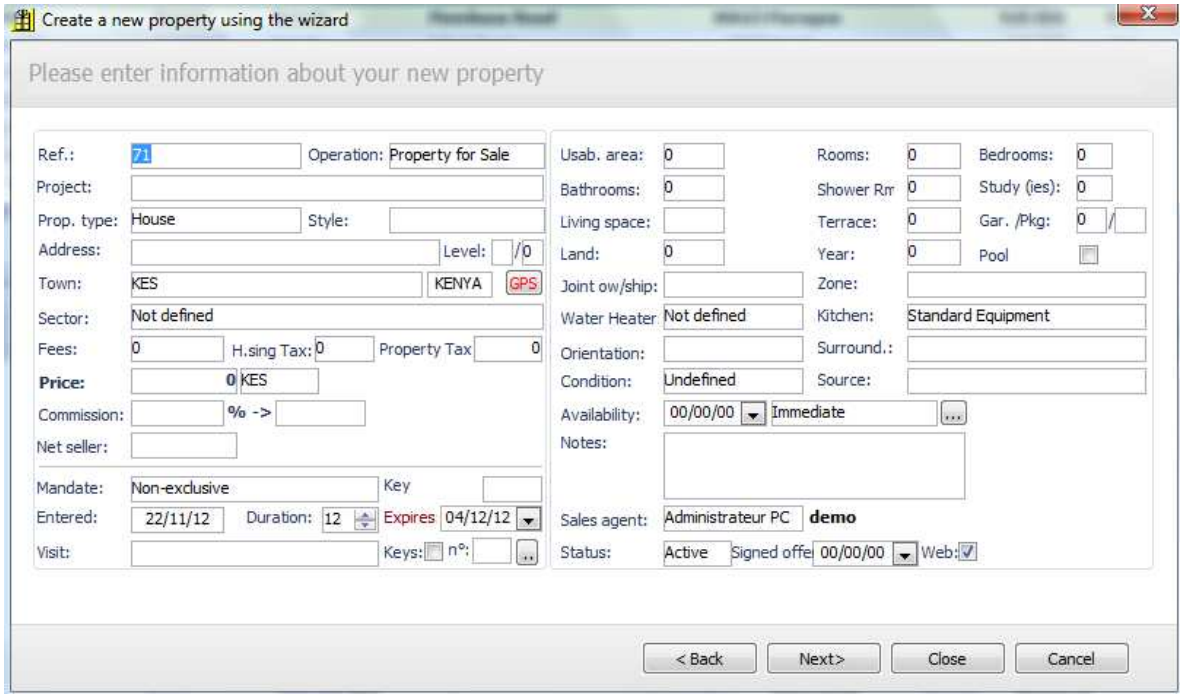
Tutotial 1.0: Create a property

Objective: In this tutorial you will learn how to create a property.

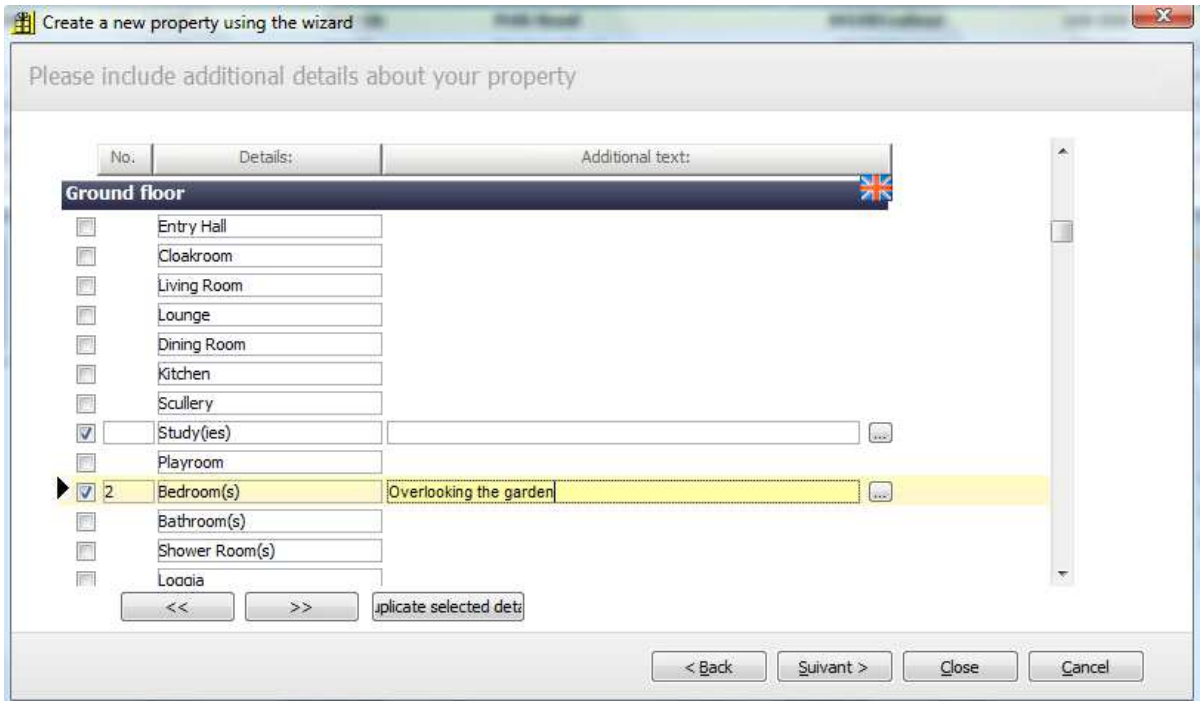
After launching **Activimmo**, select the **Properties** menu / **Create a property listing** or **«File** menu / **New Property»** or **Management** menu/ **Properties** / **Create a property listing** or even use the keyboard shortcut **F9** / **Create a property listing**. A window opens and asks if you want to use the wizard to create your property listing.

> ❖ **NOTE** :
>
> **The wizard** gives access successively to all input forms for the insertion of a property listing (such as the general description, detailed information concerning the various rooms, the input form for the title and text for the publication of ads, the photos insert page, it also provides access to the data sheet of the property owner). If you do not use the wizard to input your property details, only the window for entering general information will be available.
>
> It is therefore recommended to always use the wizard for a detailed and optimal encoding for the property.

➢ The **window** for **creating a property listing** then appears. Fill in the blank areas of the input form and click the **« Next »**button.

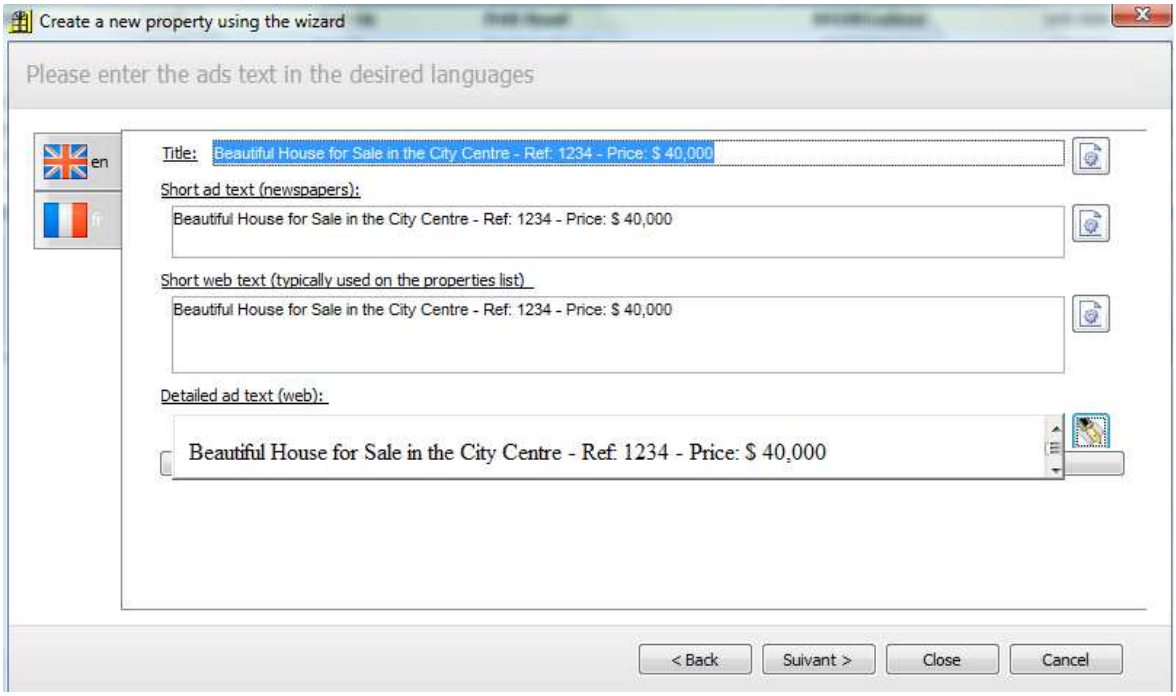


➢ The **next window** allows you to **insert details** concerning the **property**. For example, details about rooms located on the ground floor. $

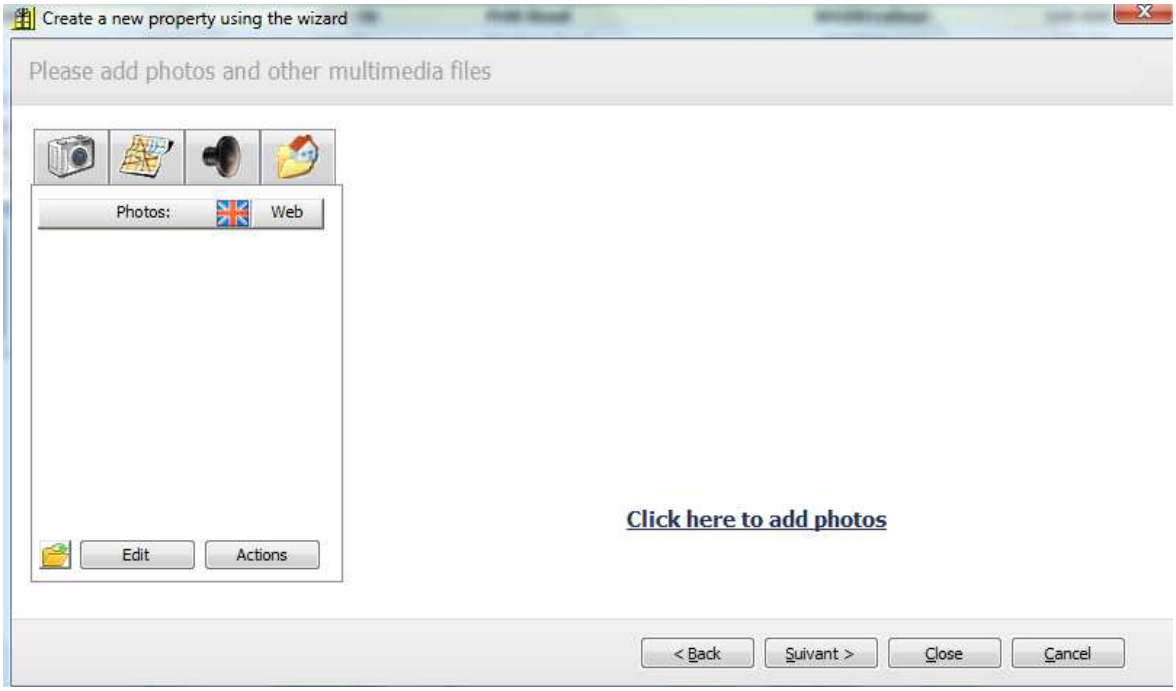


➢ Then click on **«Next»**

➢ You must then **choose a title** for your property in the new window that opens. The title chosen will be used for **displays** and **ads** concerning the property. Then, fill in the ad text. Once done, click **Next**.$


Create a new property using the wizard
Please enter the ads text in the desired languages
en
fr
Title:
Beautiful House for Sale in the City Centre - Ref: 1234 - Price: $ 40,000
Short ad text (newspapers):
Beautiful House for Sale in the City Centre - Ref: 1234 - Price: $ 40,000
Short web text (typically used on the properties list)
Beautiful House for Sale in the City Centre - Ref: 1234 - Price: $ 40,000
Detailed ad text (web):
Beautiful House for Sale in the City Centre - Ref: 1234 - Price: $ 40,000
< Back
Suivant >
Close
Cancel

➢ The next step allows you to **insert photos** of the property. To do this, click on «**Click here to add photos**».$



➢ By clicking on the folder icon: you can **add** a **photo from your files**. You can also insert a photo directly from your **digital camera**. To do this, connect your device to your computer:

- If your camera appears directly in your browser, select your photos, just as if you were to look for them in your personnal file.

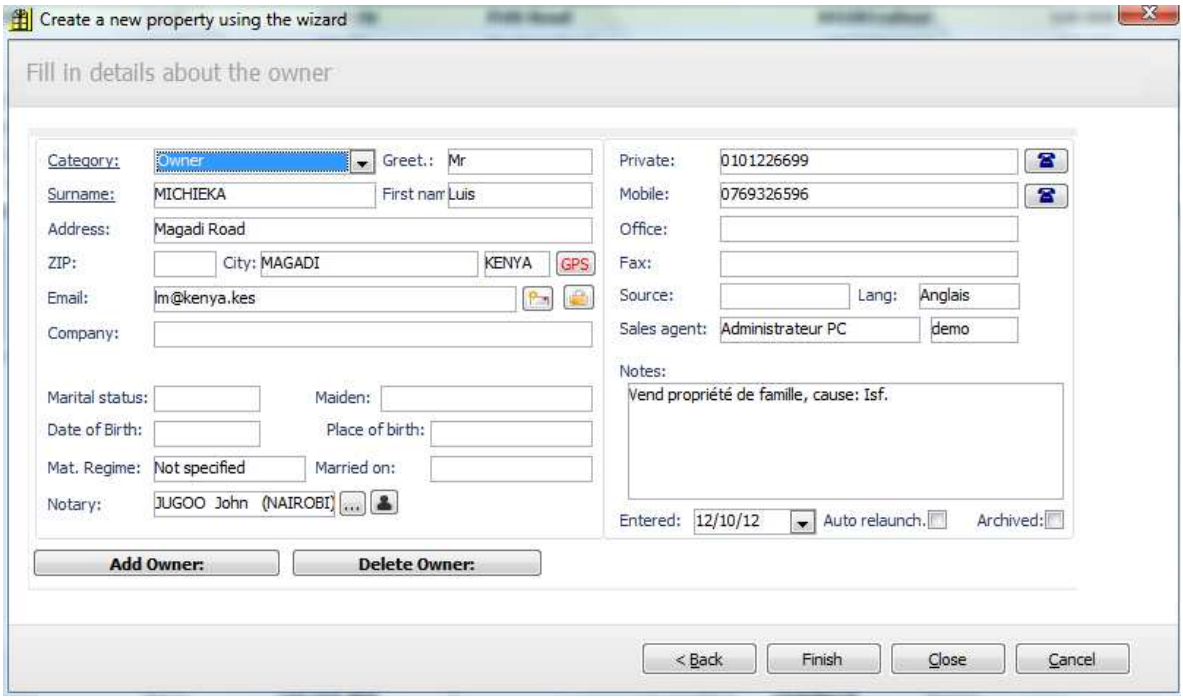
- If your camera does not appear in your browser, use the program supplied with your camera to transfer images to your computer and follow the procedure described in the previous example.

Activimmo offers a wide array of options for editing your photos and add text to them using the buttons **Edit** and **Actions**.

Note:

Activimmo allows you to insert a **«Copyright»** on your photos. Thus, your photos definitely belong to you.

➢ The **new window** that appears next on the screen allows you to **enter information** about the **owner** of the **property** if he is not already in the database. Fill in the appropriate fields, then click **«Finish»**.



Your property is now saved in the **Activimmo** database.

❖ **Note**:

Once you have **created your property listing**, you can **check** the **information recorded** by clicking on the tabs **Property**, **Details**, **Desc. (Description)** and **Owner** of the page displayed on the screen. The **Media** tab allows you to view photos of your property.

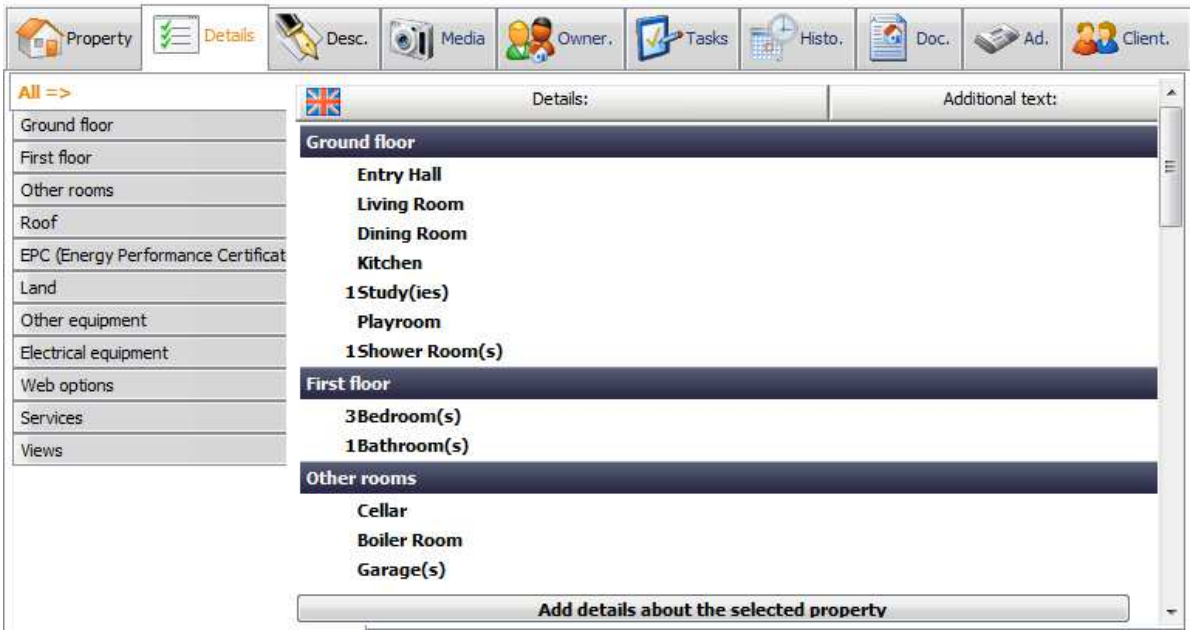
Tutorial 1.1: Add characteristics

Objective: In this tutorial, you will learn how to add details on a property.

The **Details** tab in the property window allows you to **accurately describe** the **characteristics of a property**. Thus, it is possible to record all specific information on a property such as « the kitchen equipment, the characteristics of each room, etc. ».

❖ **Note:** You need to be in **Edit** mode if you want to edit data.

➢ To add specific details on a property previously created, **select** the **property** and then click on the **Details** tab on the screen currently displayed.



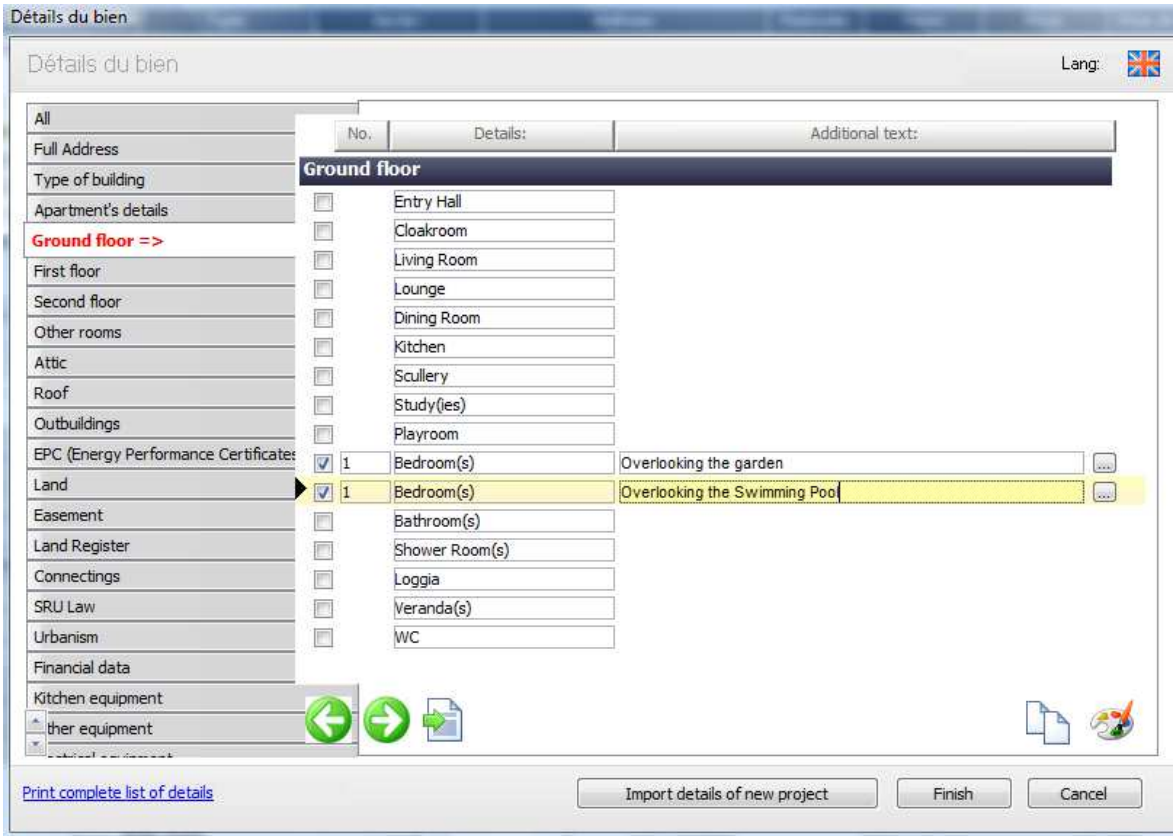
In the menu that appears to the left of the window, **select** the **section** of the **property** you need (Ground floor, etc.), then click **«Add details about the selected property».**

➢ In addition, in this window you can:

- Indicate an approximate value (example: If your property has 3 bedrooms, you can enter **3** in Section **No.** (Number)

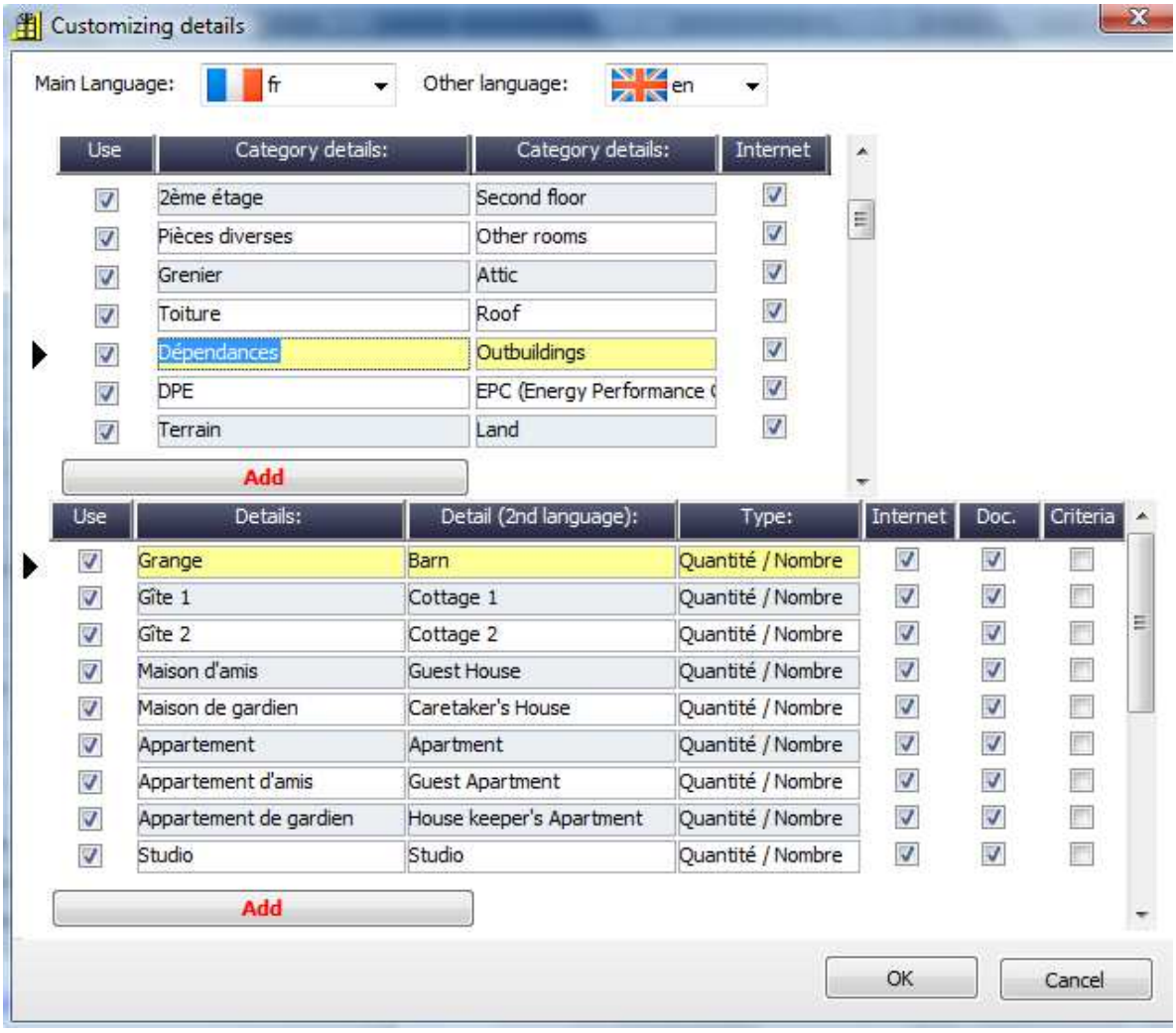
- Provide a complementary description of the detail in different languages (to access the various languages, use the drop down menu with national flags).

➢ You can duplicate the operation for all rooms or parts of the property before you begin to write the descriptive text.



➢ The **4 buttons at the bottom** of the window **allow** you to: switch from one detail type to the other (**«previous details** and **next details»**), **duplicate** or **customize** a detail.

If you click on the button **«Customize available details»** (**icon** that looks like a colour palette), the following window opens:



Using the window in the top table (section), **select** the **type** of **details** concerned by the addition (for example, if you want to add the presence of a cellar in one of the outbuildings, you need to select «Outbuildings» in the top table and click **«Add»** (in the bottom window). Then enter the detail to add in the box that has just been created: «cellar» in this example). Then click **OK** to confirm.

❖ **Note**: **The bottom table** enables you to insert details but also allows you to determine their **use** in the **property publication** on the **Web**, in the **creation of documents** or as **criteria** in a multicriteria search.

To **confirm** the additions and modifications, click on the **« Save Changes »** button (on the filter bar) or through the **Edit** menu or by using the keyboard shortcut **F3**. The details will then appear in bold letters.

Tutorial 1.2: Add descriptions

Objective: you will learn to create the descriptive texts for a property.

➢ To do this, **select** the desired **property** and click on the tab **«Description»** in the center of the screen. Then select:

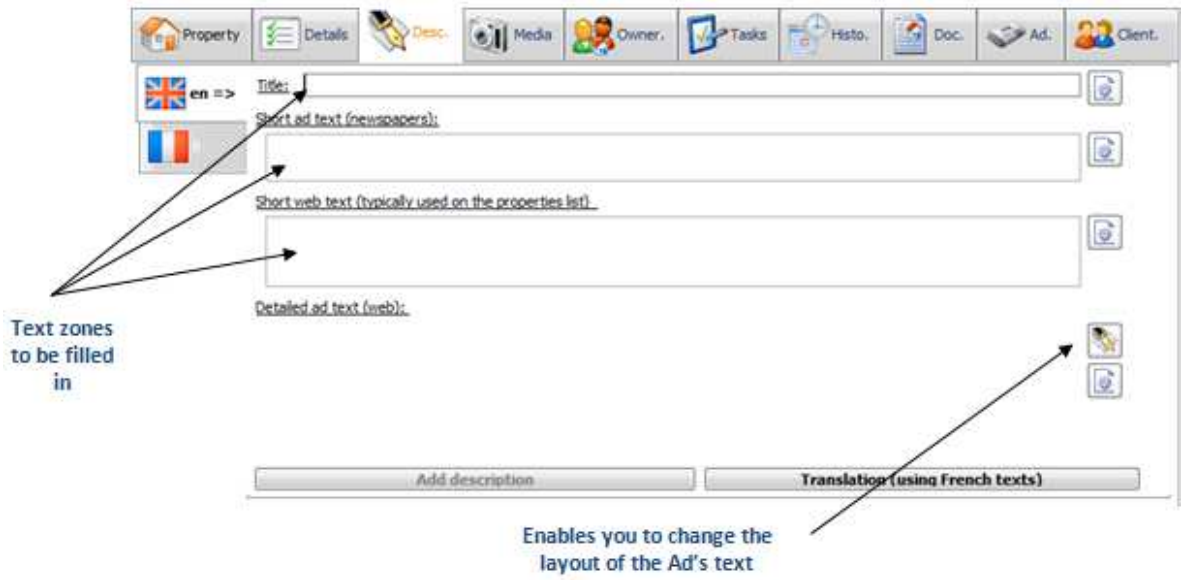
- **«Edit»** from the **Edit** menu

- Or use the **edit the current data icon** (3rd icon on the **toolbar**)

- Or choose **«Modify property details»** on the vertical menu (sidebar) under **'Properties'**

- Or use the keyboard shortcut **F2.**

➢ The window is now accessible in Edit mode.



- You must first **insert the title** you have chosen for your window displays as well as the property publication on your Website.

- This window contains **2 text boxes** used to enter the text for the periodic ads (newspapers / magazines...) and the text integrated about the property on your agency's Website.

- **The third text box** allows you to change the layout of the property text when published on the Web.

➢ To confirm the modifications made, use the keyboard shortcut **F3** or select **«Save Changes»** from the **Edit** menu. You can also use the **icon** (shown on the left here) in the **toolbar**.

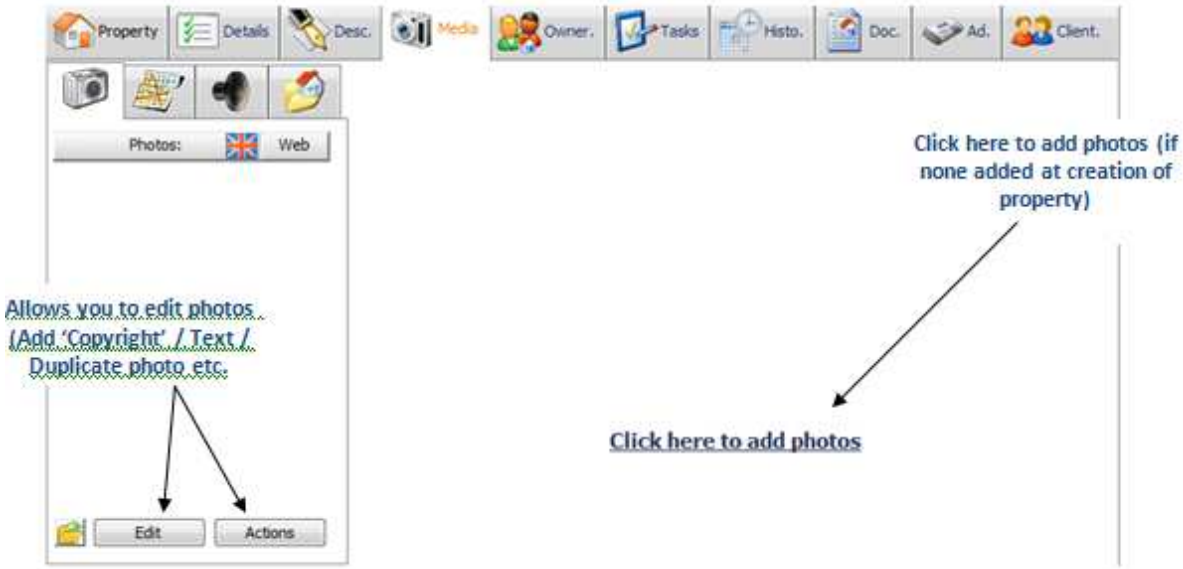
Tutotial 1.3: Add photos

Objective: In this tutorial, you will learn to add photos to an already existing property.

To do this, you must first **open** the **property window** and click on the **Media** tab.

➢ If you want to add a new photo or add an additional photo for a property, select the **Edit** menu or use the keyboard shortcut **F2**.

➢ If no photo was added during the creation of the property, click on **«Click here to add photos»**.



➢ By clicking on the folder icon: you can **add** a **photo from your files**. You can also insert a photo directly from your **digital camera**. To do this, connect your device to your computer:

- If your camera appears directly in your browser, select your photos, just as if you were to look for them in your personnal file.

- If your camera does not appear in your browser, use the program supplied with your camera to transfer images to your computer and follow the procedure described in the previous example.

➢ To **edit photos**, select the **Edit** menu or use the **keyboard shortcut F2**.

The **Edit** and **Actions** buttons allow you to edit your photos in a photo editing software without having to exit **Activimmo**.

Tutorial 1.4: Add documents to a property

Objective: In this tutorial, you will learn to add documents on an existing property.

Activimmo gives you access to a wide range of **customizable documents based on your properties and contacts** (window display, client visit sheet, mandate, relaunch, description, sale agreement, account activity report, etc...). You will need to select a document from the list. You can then print these documents or send them by e-mail.

- To **create a document**, open the properties window and select a property. Click on the **Documents** tab in the center of the screen, then click **«Create a document for this property»** or use the keyboard shortcut **F11**.
- The window that opens allows you to **select** the **type of document** you want. Then click on **«Next»**. Select the contact to which the document relates to. The document will then appear on the screen.
- The left vertical menu (sidebar) offers many options: **print** the document, **send** the document **by e-mail**, **export** the document to **PDF** or **send** the document in **MS Word**.

[To save the document, close the document and click **«yes»** in the pop up window.]

❖ **Note**: By using the **File** menu / **Save As**, you can save this document in your personal files.

❖ Summary:

- Be in the property window, otherwise press **F9.**
- Select a property (by clicking on the property in the table, the property row turns yellow)
- Go to the **«Documents**» tab.
- Click on **« Create a document for this property»** or use the keyboard shortcut **F11.**
- Select a document and click on **«Next».**
- A new window opens : select the contact to which the document relates to and click on **«Next».**

- Select the **desired option** (print, send by e-mail or in MS Word, export to PDF).
- **Save** the document.

Tutorial 2.0: Create criterias for client

Objective: In this tutorial, you will learn to reconcile the criteria of your prospects and properties corresponding thereto.

Note: This function is available when creating a new contact [when you use the wizard, the criteria input window opens automatically] or when opening the contact window previously saved in your database by clicking on the «**Criteria**» tab.

Creating criteria when saving a new contact using the wizard:

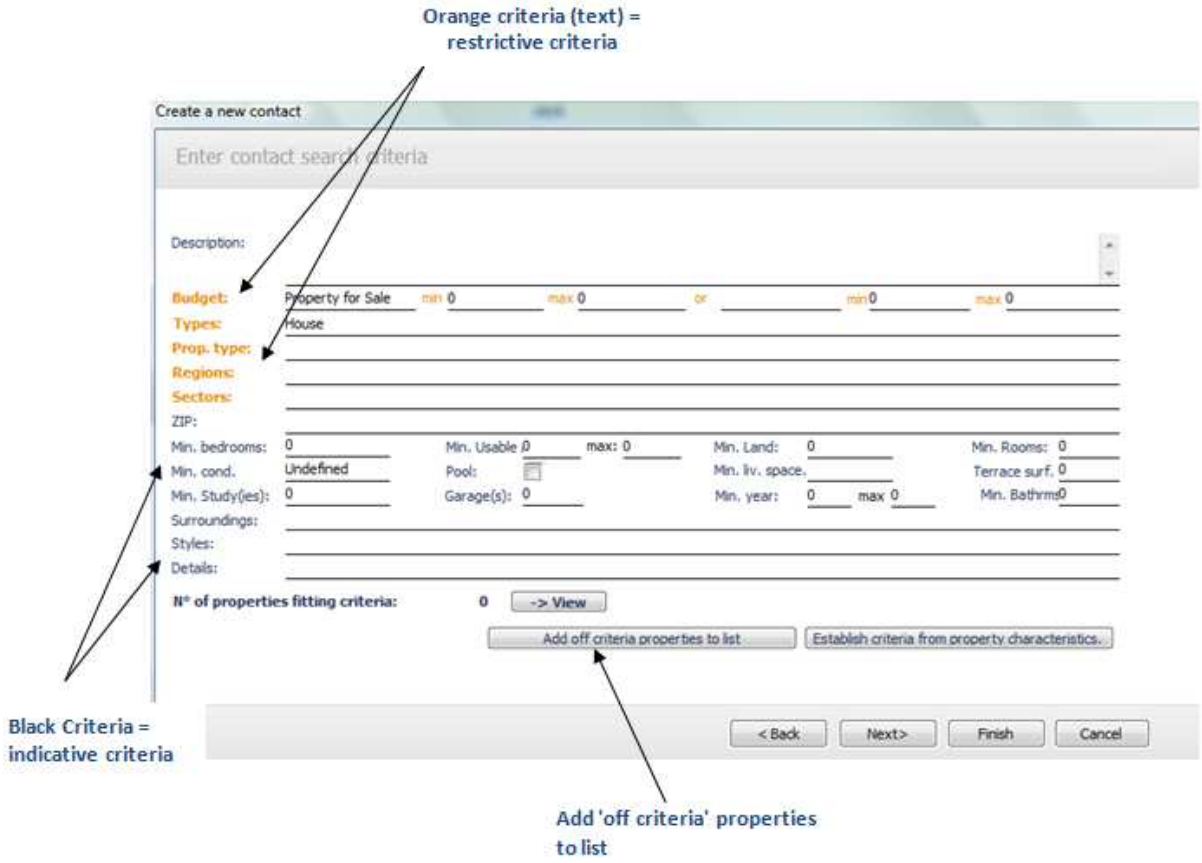
- Insert your contact information and click on **«Next».**

- The window for entering the criteria appears on the screen. Five criteria are marked in orange: **Budget**, **Types**, **Property type**, **Regions** and **Sectors**.

➢ **Criteria** that appear in **orange** are **restrictive** criteria as those shown in **black** are **indicative**. In order to make a criteria restrictive, simply click on its name, it turns orange. If you click on the name of a criteria which is in orange letters, it will turn black and becomes indicative. It is up to you to modify them, as needed, in a single click on their name.

❖ **Note**: **Budget** is the only exception and will always remain in orange colour as it is a **restrictive criteria**.

➢ Restrictive criteria will eliminate properties that do not match your search criteria while indicative criteria will classify properties based on the satisfaction percentage (score).



➢ Fill in the fields that match your contact's criteria then click **«Next».**

A window opens and the software displays the properties corresponding to the search criteria of your contact.

Creation of contact's search criteria previously saved in Activimmo:

- Select the contact for which you wish to add criteria.

- Go to the **Criteria** tab and click on the button «**Define search criteria**».

- **Fill in the search criteria** of your prospect, knowing that **five** proposed **criteria** appear by default in **orange** (**Budget**, **Types**, **Prop. type**, **Regions** and **Sectors**), which means that it is **restrictive** criteria.

➢ Indeed, in a **simple click** on the name of a criteria, you **decide** that it is **restrictive** (it appears in orange) or that it is **indicative** (it appears in **black**).

Restrictive criteria will eliminate properties that do not match your search criteria while indicative criteria will classify properties based on the satisfaction percentage (score).

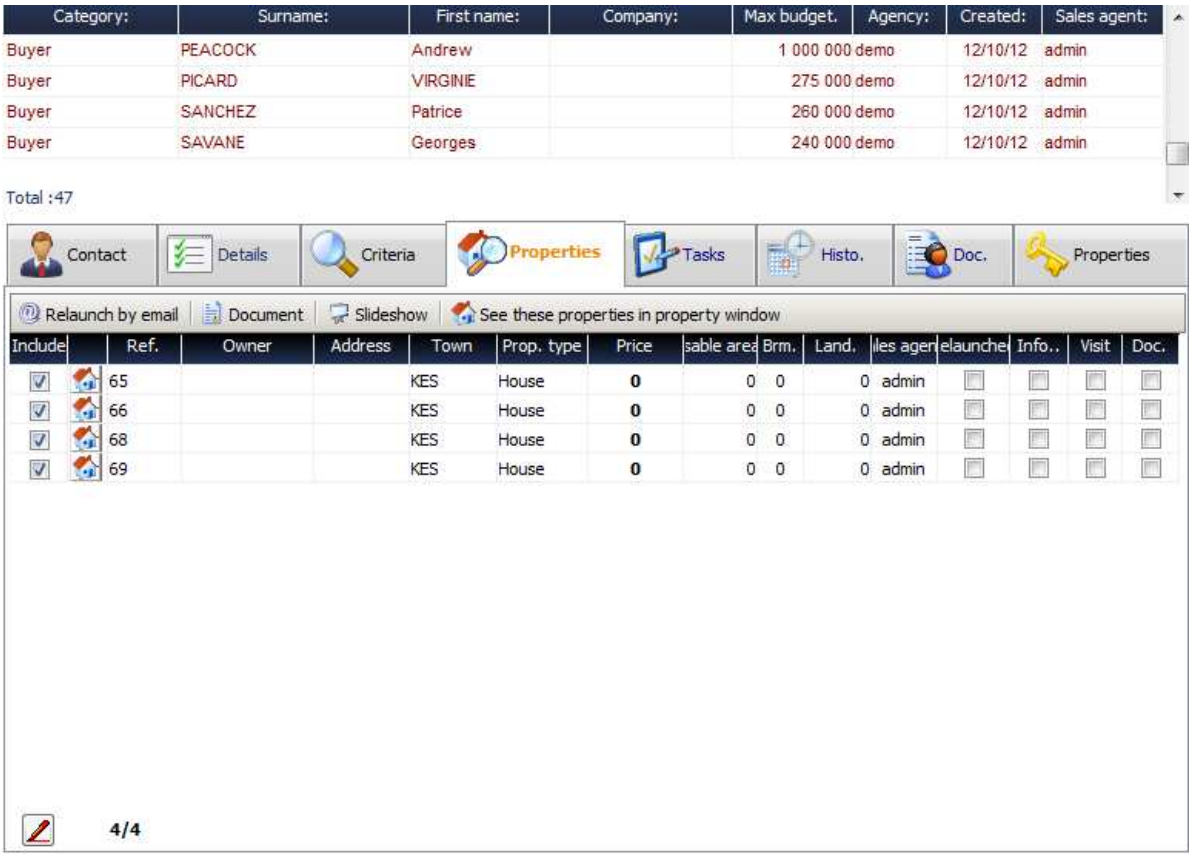
❖ **Note**: **Budget** is the only exception and will always remain in orange colour as it is a **restrictive criteria**

- When you have finished entering your client's criteria, **confirm** with the keyboard shortcut **F3**.

➢ To obtain the **result** of the property **search**, simply **click** on the tab **«Properties»**.

The results appear in a list, you can get all the property details with a **single click** on the **house icon** (on its row).

➢ The following window opens:

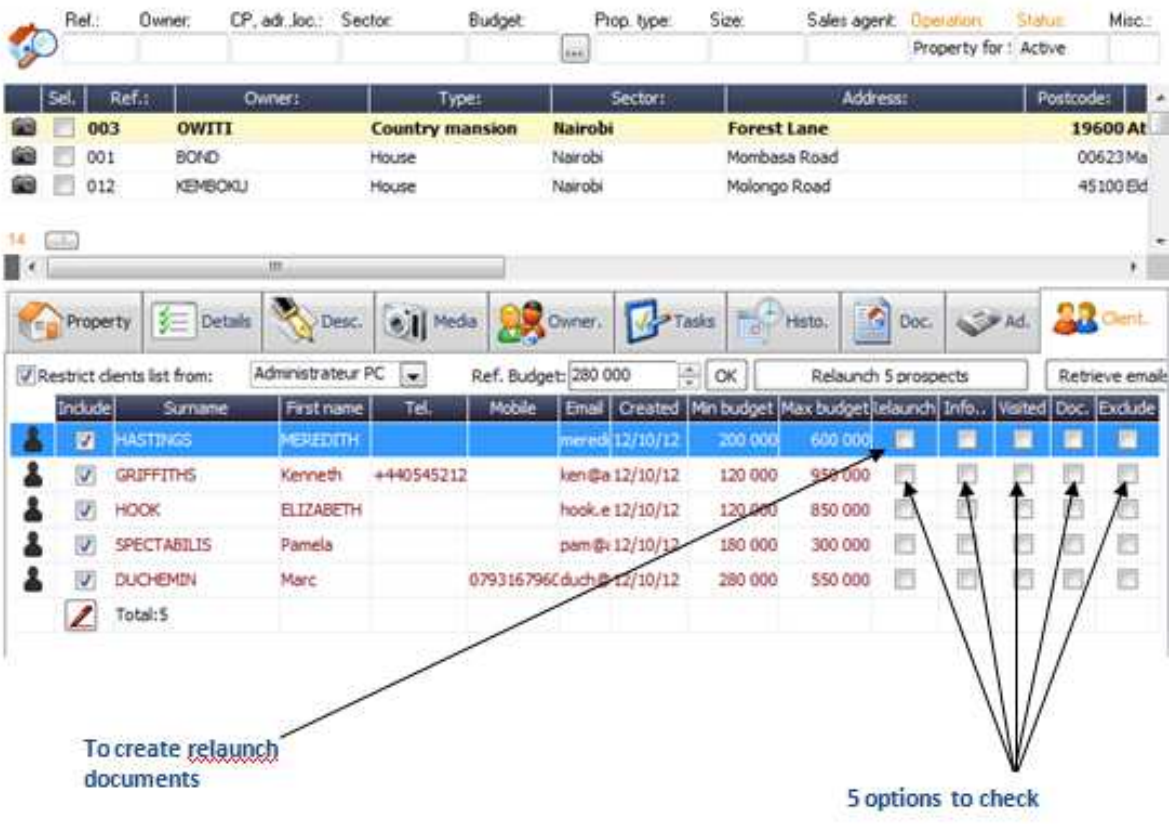

Category: Surname: First name: Company: Max budget. Agency: Created: Sales agent:
Buyer PEACOCK Andrew 1 000 000 demo 12/10/12 admin
Buyer PICARD VIRGINIE 275 000 demo 12/10/12 admin
Buyer SANCHEZ Patrice 260 000 demo 12/10/12 admin
Buyer SAVANE Georges 240 000 demo 12/10/12 admin
Total :47
Contact
Details
Criteria
Properties
Tasks
Histo.
Doc.
Properties
Relaunch by email
Document
Slideshow
See these properties in property window
Include Ref. Owner Address Town Prop. type Price sable area Brm. Land. les agen elaunche Info.. Visit Doc.
65 KES House 0 0 0 0 admin
66 KES House 0 0 0 0 admin
68 KES House 0 0 0 0 admin
69 KES House 0 0 0 0 admin
4/4

Tutorial 2.1: Clients interested by a property

Objective: In this tutorial, you will learn how to survey all clients that may be interested in the property.

- After launching **Activimmo**, press on **F9** or click the **Properties** menu; the properties window appears. **Select** a **property** (the one on which you want to do a search).
- Click on the **Client** tab, the list of clients potentially interested by this property appears.

- You can access the contact's information by clicking on the **icon** (to the left of the client's name). By doing so, a window opens and shows the detailed information sheet for the contact.



- The page offers **different options to check**: in fact, you can find out if the prospects have already been **relaunched**, if they have **received information** about the selected property, you can confirm if the customer has visited the selected property by checking the box: **'Visited'** (By doing

so, an **appointment** is created in the **Agenda**), you can **create a document** linked to the property and the prospect or even **exclude a contact from the list** of prospects potentially interested by the selected property.

➢ The button **«Relaunch 'x' prospects»** enables you to create **simple or grouped relaunch documents** that can be sent **by E-mail**, or **create window showcase**.

❖ **Summary**:

- Press on **F9** or select the **Properties** menu.
- Select a property.
- Select the **Client** tab.
- The list of potentially interested clients appears (click on Refresh to check/update the list.)

❖ **Note:** if the criteria are not defined in the contacts criteria tab, it will be impossible to establish a list of contacts potentially interested by the property.

Tutorial 3.0: Document Templates

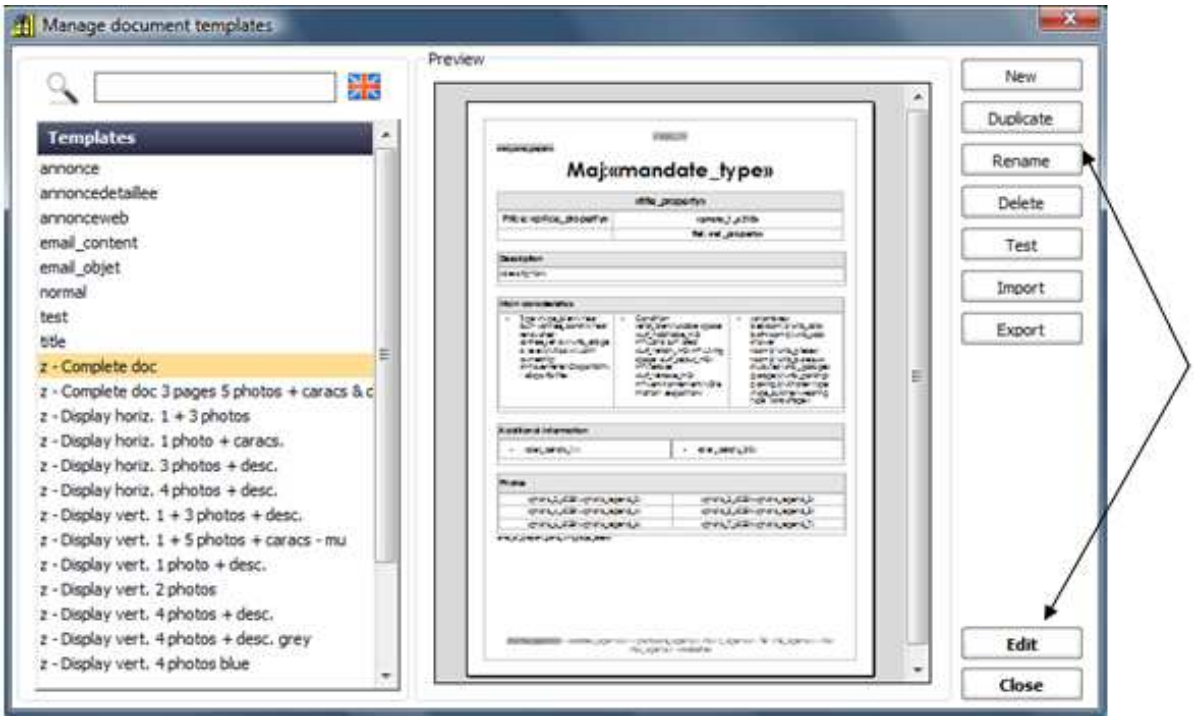
Objective: In this tutorial, you will learn to manage the document templates that will be useful when you send messages or other documents.

After launching **Activimmo**, click on the **Customize data** menu, then choose **Document templates**. A window opens and gives you access to all your document templates in a list.

1 – Document templates management:

The commands associated to the documents are represented on the right by **7 buttons** (**new**, **duplicate**, **rename**, **delete**, **test**, **edit** and **close**).

> ❖ **Note**: You can also **Import** or **Export** documents.



- To create a new document template, click on **new** and **enter a title** for your template.

- Using the **duplicate** button you can create a duplicate copy of your document and use it as a base for creating editable documents.

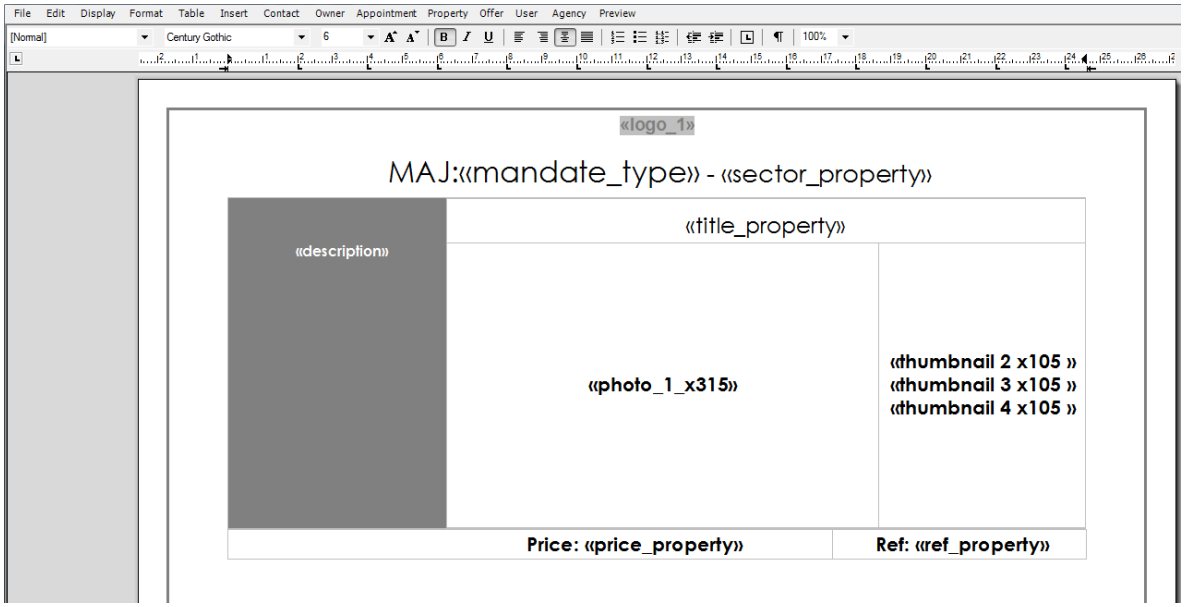
- The **rename** button allows you to edit the title of your document.

- <u>To delete a template</u>, select a document and click on the **delete** button on the right of the screen (or press the **delete** or **Del.** key on the keyboard).

- <u>To edit a template</u>, double-click on its name in the list or click on the **edit** button at the bottom right.

- When your documents are ready, click the **close** button.

Your template is created and can be used when creating documents linked to the relevant property and contact.



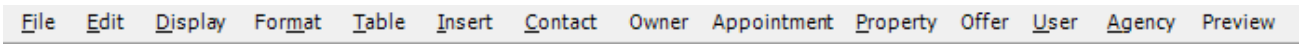
2-The integrated word processor :

The integrated **Activimmo** word processor looks like any other word processor. However, it offers the possibility to insert data from your database in the form of merge fields

<u>Merge Fields</u>: **space** to **insert text** (eg: names, addresses, details, etc. about your properties and contacts) **or images** (eg: property photos from the **Activimmo** database). You can therefore create your own document templates that will be automatically filled in by the appropriate details about the contacts and property(ies) concerned.

➢ When opening the word processor, you will notice the presence of the classic menus (**File**, **Edit**, **Display**, **Format**,

Table and **Insert**) that list the usual functions such as saving, opening a file or setting the layout of the document, etc.



➢ The **eight** remaining **menus** will allow you to insert merge fields where the text cursor is located.

❖ **Note:**

- Only the names of the merge fields will be visible in edit mode, they will be replaced with data during the merge.
- If you want to see the final document, use the button: **Preview** in the top menu, or use the option: **Test** on the documents window.)

❖ **Summary**:

1. **Customize data** menu.
2. Choose **Document templates**.
3. Click on **new** to create a new document template and give it a name.
4. The **menu bar** contains the classic tools for the word processor.
5. The menus (**Contact**, **Owner**, **Property**, **Offer, User** and **Agency**) are used to insert specific data.

Once modifications made, exit the editor and click on **Close** in the **document templates** window and save the changes.